

**Challenging the necessity of organizational community for rhetorical genre use:  
Community and genre in the work of integrated marketing communication  
agency writers**

by

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## CHAPTER 1 INTRODUCTION: RHETORICAL GENRE, COMMUNITY, AND THE WORK OF AGENCY WRITERS

As professionals who produce organizationally sanctioned texts, professional writers play a crucial role in the success of organizations. These writers must communicate key messages and strengthen relationships with various audiences, including clients/customers, suppliers, target populations, industry and government regulators, competitors, and the organization's own employees, to name just a few. To meet these challenges, writers become organizational spokespersons who use their knowledge of the organization's mission, culture, and relationships as well as their own communication expertise to represent the organization consistently to the world (Debs, 1993).

The five professional writers I studied over a six-month period from late 2005 to Spring 2006 experienced the many challenges of writing for organizations: the highs and lows of putting your work out there for the world to judge, the excitement of new creative tasks as well as the boredom of being over-directed, and the pleasure of doing a job you love as well as the rejection of losing that job when you least expect it. The following vignettes introduce the participants and their writing roles:

- Ellis<sup>1</sup> is a well-educated professional writer with degrees in both the creative and business aspects of advertising. One of Ellis's main duties is to write and produce his retail company's television commercials. Most were done in the company's traditional, narrative style, so Ellis was thrilled when his pitch for a comedic approach was approved, allowing him to flex his creative muscles in presenting the company to the public.

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<sup>1</sup> The names of the participants, the agency, and all client organizations as well as some identifying details have been changed to protect confidentiality, to protect proprietary information, and to respect confidentiality agreements.

- Paul is a talented writer who became a professional writer through chance and apprenticeship rather than education. He manages many short- and long-term communications projects for his company, including everyday publicity and public relations activities, newsletters, and the occasional crisis communication situation. While his company niche is public relations, Paul wants to write more creative ads.
- Steve is a managing writer responsible for his own writing and that of the writing staff in his organization. Steve's managerial activities take up more time than writing these days, but he is often called upon to advise his writers because he has a deep well of institutional knowledge owing to 10+ years with the company.
- Joe has been a professional writer for nearly 25 years. While his seniority and skill have earned him a management role in his financial company, he prefers to write full time and mentor other writers. Joe was excited to write the annual report again this year, and his abilities are so respected that he wrote the entire report, including the CEO letter, after only one content meeting with the executives and with very minor final edits to his text.
- Finally, George, a career professional writer, telecommutes part-time to research and write for an environmental firm as needed. He specializes in longer form documents such as brochures and research reports because of his intimate understanding of the industry and its audiences. He recently wrote a spur-of-the-moment research report in time for a tradeshow by drawing on his well-developed network of contacts.

During the course of my study, each writer undertook various writing tasks, both creative and common, strategic and mundane, to fulfill the mission-specific needs of their organizations.

To do so, they drew heavily on their instincts as writers, their professional training and

experience, and their organizational knowledge. In these ways, the writers are like other writers or professionals-who-write studied in the professional communication literature.

But in other important ways Ellis, Paul, Steve, Joe, and George are *not* like other professional writers studied. None of the five writers is employed by the organization for whom he wrote in the above vignettes. They are spokespersons for these organizations, but they have no “insider” organizational knowledge except what they have been given or collected. They have no access to the final audiences to whom they write. And they share no common culture with the organizations for which they produce documents.

Ellis, Paul, Steve, Joe, and George are professional writers at PSA, a regional integrated marketing communication (IMC) agency that provides marketing, branding, advertising, and public relations services to organizations in a variety of industries. Each writer at PSA works with or manages at least two clients, usually more, that have contracted PSA to serve their promotional communication needs. To write well for client organizations in which they have little stake beyond the agency contract, these writers must draw on their varied professional experiences with different clients and industries; their professional training and genre-specific expertise; and collected information about the client, its goals, industry, and audiences. Essentially, these writers are not members of the organizations for which they primarily write; they are outsiders, a status that is valued by their clients due to the insight their distance can provide.

Since the social perspective on writing acknowledged “communication is inextricably bound up in the culture of a particular society” (Faigley, 1985, p. 236), professional communication researchers have assumed community (i.e. organizational membership), is required to pursue organizational rhetorical goals. Yet these writers are not members of the

client communities but are members of the PSA agency and IMC industry communities. Their positioning outside their client organizations calls into question the accepted view of genre as the social action of a community by challenging the role community membership plays in each writer's ability to write and wield genres rhetorically. Can agency writers employ genres rhetorically if they are not members of the client organizations? If so, how do agency writers negotiate issues of genre among the many communities involved?

These questions challenge genre and community scholarship and introduce a new population of professional writers to the discipline. In this chapter, I lay the basic theoretical foundations of this dissertation by first exploring the existing definitions of rhetorical genre and community and the limits these definitions imply. I then discuss how the idea of community is expanded by writers like those at PSA, introduce the integrated marketing communication occupational community, and explain how these professional writers challenge our ideas of genre use and community. In closing, I will explain the structure of the dissertation in which my argument will be made.

### **GENRE AS SOCIAL ACTION IN COMMUNITIES UNPACKED**

In this section, I briefly introduce literature on genre theory and community to examine how rhetoric and professional communication scholars have connected these concepts and to show how this perception is at odds with the position of agency writers.

#### **Defining Genre and Community**

Since social theories of writing gained sustained momentum in the 1990s, genre theory has provided a framework to explore the many complexities of workplace writing and



to test developing genre-as-social-action hypotheses, all while forcing a tacit limited perspective on researchers (Zachry, 2000). While the term “genre” implies for many a form or formula for arranging documents, North American genre theory<sup>2</sup> defines genre as rhetorical, as a productive means of creating cultural knowledge and communicating appropriately in communities. Early reformers of the genre-as-formula concept, including Carolyn Miller (1984, 1994) and Charles Bazerman (1988, 1994), draw on Lloyd Bitzer’s (1968) notion of rhetorical situation to view genres as useful communicative patterns that come about, change, and decline as needed to accomplish community work. These social patterns are generated by a community responding to similar situations regularly and also perpetuate the community by establishing norms new members can learn during socialization into the community. The idea of genre as social action is so widely accepted in professional communication scholarship that virtually all published articles referencing genre cite Bitzer and/or Miller as foundations.

That genres are generated by and make meaning within communities is central to the idea of genre as social action. From a social perspective, communication situations arise within and among communities of language users, and members draw on communal knowledge of appropriate discourse in similar situations to respond. This communal knowledge of appropriate discourse amounts to what Miller (1984) calls the available means of appropriate response, or genre. In her 1994 follow-up to her influential genre article, Miller draws on Anthony Giddens to stress the ordering function of genres within rhetorical communities, which she explains are communities defined by the genres they use to get

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<sup>2</sup> North American genre originated in the United States and Canada, not to be confused with a second common theory, Australian genre theory, which developed from the linguistic theories of Saussure and Halliday.

things done, just as the genres in their turn are created by the community. Using this theoretical foundation, professional communication theory and research studies to date inextricably link genre and community.

Yet as work in rhetoric, composition, and professional communication, as well as in organizational behavior, sociology, and anthropology shows, community and genre are slippery concepts to define with ever-shifting boundaries and centers. Traditional definitions of community as geographical or linguistic groupings broke down long ago in the wake of industrialization and globalization. Many scholars in different fields, especially in the social sciences, have attempted to construct new, more useful definitions of community. For example, in defining a community as a group of people with some common quality or goal that separates them from other groups, social anthropologist Anthony P. Cohen (1985) draws on Wittgenstein to focus on likeness as a defining characteristic of community (p. 12). Other definitions delimit community as “the organization of social activities” that permits people to function effectively and appropriately within their daily social lives (cf. sociologist Robert C. Anderson, 2000, p. 14). These broad perspectives create a fluid concept of community that could apply to many different groups of people.

While the social sciences take a broadly societal view of community, other disciplines have attempted to limit the idea of community to their needs. Professional communication literature largely defines community as a social construct that maintains, organizes, and regulates the beliefs, values, and discursive choices of like-minded people (Thralls and Blyler, 1993, p. 7, 9). Similarly, Miller’s (1994) definition of rhetorical community focuses on shared views and norms especially related to discourse. These definitions grow from earlier work on discourse communities, especially in those attempting to define composition

and professional communication as independent academic disciplines (Freed and Broadhead, 1987; Harris, 1989; Bizzell, 1992).

As a whole these definitions of community illuminate our human desire to categorize ourselves, our actions, and our discourse meaningfully in relation to others and our need for rules by which we can relate to and separate from those around us, regardless of how the boundaries might overlap. Through our categorizations, we create identifications and share goals with others. Communities, in this perspective, are centered on a shared purpose and a shared repository of knowledge from which members can draw to respond appropriately in familiar situations, an ideal that still holds sway especially in professional communication literature. According to current theory, genres have rhetorical purpose through this shared sense of community.

### **Reinforcing the Definitions in Professional Communication Scholarship**

Since genre and community membership have been rhetorically and inextricably linked, most professional communication genre research focuses on organizations as the primary unit of community. Organizational members can share a purpose in meeting business goals, share institutional knowledge about how those goals have been successfully achieved in the past, and share a sense of appropriate responses to situations based on history and experience. This focus on organizations, though, leads to an unnecessarily limited view of genre in the professional realm.

Most studies in this vein explore how workers draw on organizationally situated genres to address various communication situations and the organization's goals, as was initially suggested by both Faigley (1985) and Lee Odell (1985). The communities discussed

in past professional communication work are usually organizations in which the participants work and of which they are members at some stage of socialization (for example, Devitt, 1991; Dautermann, 1993; Schryer and Spoel, 2005). Similarly, other studies demonstrate how becoming a fully participating member in a workplace or industry community requires a specific level of mastery of organizational genres (Odell, 1985; Smart, 1993; Winsor, 1996; Katz, 1998; Pare, 2000). These studies examine individuals within organizational communities who identify with or are learning to identify with the organization at a personal and professional level.

In most of these studies, individuals write from within one organizational community perspective—a bank, a hospital, a state agency, etc.—and use organizational genres to learn/fulfill the goals of the organizations (see Figure 1.1 below for a visual representation of



**Figure 1.1:** Internal writer embedded within the organizational community.

the positioning of internal writers). For example, Odell's policy analysts (1985) learned to create effective and audience-appropriate communication based on the organization's values in order to be persuasive about the policies they evaluated. Similarly, Graham Smart's bank analysts (1993) had to learn their readers' expectations and priorities before they felt comfortable writing in the

accepted genres of the bank. These studies posit the necessity of writer identification with the organizational community and culture in creating effective, community-appropriate documents. When identification does not occur, ties usually sever. In Susan M. Katz's study

(1998) for example, the architect Peter left the engineering consulting firm after a short employment because he believed his contributions to the community and willingness to communicate in the organization's genres were ignored, thus providing little incentive to remain in the community.

As these studies demonstrate, current theory embeds the notion of genre in community membership for rhetorical underpinning, assuming that learning to share purpose and knowledge, to recognize recurring situations, and to share the organizational goal of responding appropriately through genres is necessary for organizational rhetorical communication. Thus, understanding the community in which certain genres have evolved and have become "stabilized-for-now" (Schryer 1993, p. 200), as well as how individuals draw on that membership to use genres effectively and rhetorically, guides current workplace genre research.

Due to this focus, genre studies in professional communication share common characteristics that may limit the application of these studies' findings. First, the participants in most studies are not what Barbara Couture and Jone Rymer (1993) call "career writers" but are professionals such as accountants, engineers, and social workers who write in their organizations to accomplish their primary tasks. Secondly, participants write primarily for audiences known or defined by the organization and within accepted organizational genres. Finally, most participants claim to achieve a higher level of organizational membership when they have mastered their organizations' purposes and genres. From these characteristics, one might draw the preliminary hypotheses that genres are organization-specific and that using genres appropriately requires organizational knowledge gained only through direct employment and membership.

Some theorists and researchers have even gone so far as to argue that genres can only be understood within the community, so genre cannot be taught outside of that milieu. For example, Jamie MacKinnon's (1993) interview research with new economists and analysts at Bank of Canada suggested on-the-job writing was the most important way the new workers came to feel they understood the organization's goals and readers' expectations, knowledge that could not be gained without actually writing in the organization. Aviva Freedman and Peter Medway (1994) argue that students can only gain general experience of workplace genres because the classroom cannot recreate the exigencies of the workplace. This claim is more fully asserted by Freedman and Medway with Patrick Dias and Anthony Pare (1999), as the authors collectively claim genre can be learned only in the situated activity of the given group or organization.

These studies appear to confirm what other workplace genre studies have implied: genres are community-bound and community-owned, and only socialized members of an organization can act socially through genres. But in tacitly agreeing with these conclusions, we neglect what we have often noted, that people belong to many communities at one time and often cross community boundaries, sharing their knowledge among many communities.

### **PROFESSIONAL COMMUNITY EXPANDED**

Thus far I have argued that professional communication studies tend to view organizations as primary communities and assume that genres are organizationally defined; if so, organizational members who wield genres must share that community's purpose and knowledge to act rhetorically for the community. However, by assuming organizations are

the primary communities under which genres are solidified-for-now, we enforce one view of community that can be challenged by professional writers such as marketing agency writers.

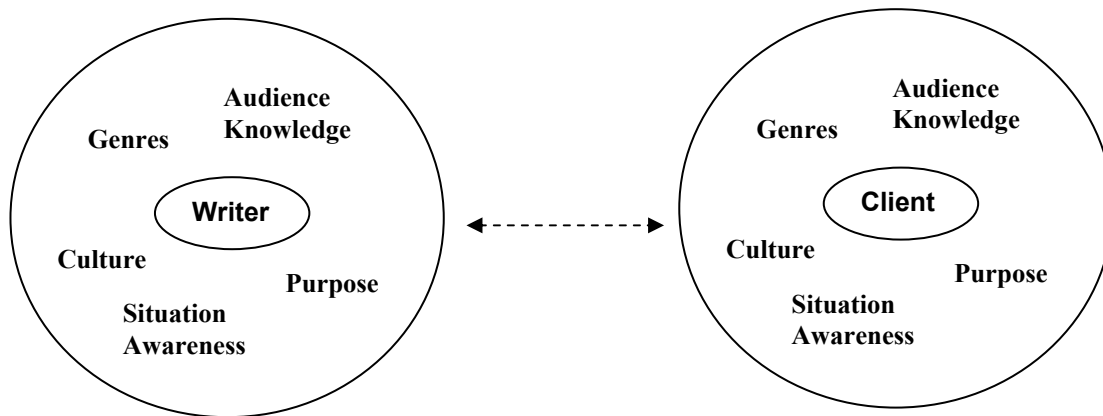
As noted in the introduction to this chapter, not all writers who employ genres for the rhetorical purposes of organizations are socialized or even embedded members of the organizations for which they write. Yet, much published workplace genre research still focuses on non-professional writers who are socialized and embedded in organizations. Even direct studies of professional writers usually concentrate on technical writers working within technical companies (Mirel, 1990; Hovde, 2001; Bowden, 2004). By limiting genre and community studies this way, we ignore populations of professional writers like the PSA agency writers whose work expands our theories of rhetorical action, genre, and community. To understand professional agency writers, I will first introduce the fields of integrated marketing communication as a professional community and then look at how IMC agency writers are rhetorically positioned differently than in-house writers.

### **Defining the Fields of Integrated Marketing Communication**

As revealed in the introductory vignettes about the PSA writers, writers working in integrated marketing communication agencies successfully write complex rhetorical messages for external and even internal audiences of the organizations that enlist their services. Much of the writing these professionals do is not informed by their agency organization. Instead the writing is informed by their *occupational* purpose and knowledge, their situation and genre expertise, and their outsider status with clients—not a commonly researched rhetorical position for writers in professional environments (see Figure 1.2 below

for visual of agency writers positioning in relations to clients). George perhaps sums up best the positioning of an agency writer in relation to in-house writers:

The in-house people have access to all the insider information, but they don't bring an outsider perspective to it. They might have difficulty figuring out why that product or service or point is important to someone who isn't getting a paycheck from their company. Magazine writers are at the other end; they are generalists. What we do as agency writers is try to bridge the gap between the disinterested outsider and the over-interested insider.



**Figure 1.2:** Agency writers separate from client organizational communities for which they write.

In the competitive and creative industry of integrated marketing communication, agencies specializing in marketing, branding, advertising, public relations, or some combination thereof perform a large percentage of the actual writing and design of client organizations' promotional materials and campaigns. Agency experts deliver a mix of promotional and strategic planning services for clients, depending on the clients' needs.

PSA's writers are occupationally trained or apprenticed experts in the genres and situations of promotional communication. For a better understanding of the writing agency professionals do, industry definitions of the IMC functions are helpful:

*Marketing* is a business function that draws on various communication strategies and tactics to disseminate and reinforce key messages about an organization or product/service to



targeted audiences with the goals of creating awareness, preference, and sales (AMA, “Marketing”; Hanser and Zimmerman, 2002, p. 14; Smith, 2002, p. 7).

*Branding* is a process by which professionals create a reputation through the repetition of the same name, symbol, and message to a targeted audience so that the audience sees the product and/or service as distinctive from others in the same category (Calkins, 2005; Sherry, 2005).

*Advertising* is the process of overtly and persuasively promoting brands by placing paid messages in various media with the goal of changing attitudes and behaviors through creative and/or informative messaging (Hanser and Zimmerman, p. 19; Bullmore, 1999, p. 58).

*Public Relations* is the unpaid counterpart of advertising, concerned with developing and maintaining good relationships with any group that could affect the organization and includes all aspects of community and consumer affairs in addition to crisis and issues management (Smith, p. 46; Bruce, 1999, p. 474).

Until recently these promotional fields were considered separate entities, and agencies were hired to perform each function independently, often leading to disjointed messaging from a client organization. An IMC approach unifies all communication efforts under one image and message for the sake of consistency and familiarity (Sirgy, 1998, p. 45). Agencies that employ an IMC approach, like PSA, integrate communication activities under one umbrella to create more value for clients through cohesive communication messages, strategies, and campaigns.

### **Understanding Agency Writer Positioning**

Drawing on this IMC approach, agency writers actively substitute for in-house client marketing staff by developing client strategies and documents from their agency location.

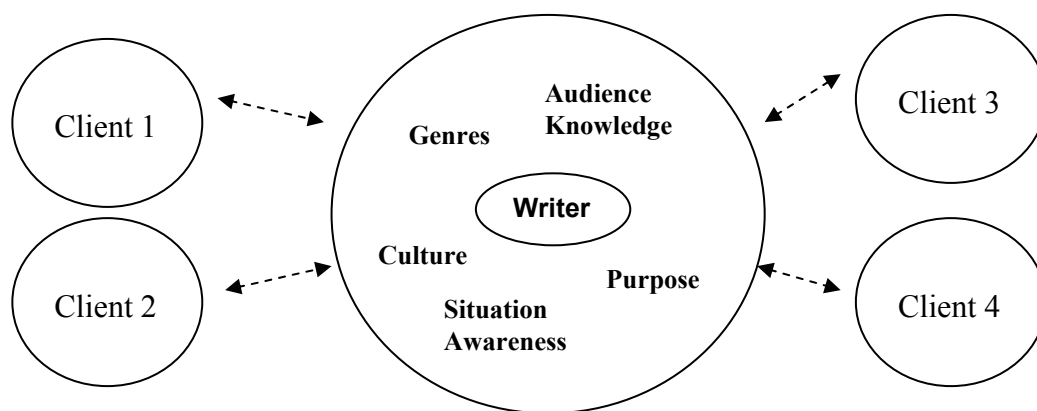
Because their work is the agency's primary product, agency writers are one of the few groups of writers who directly affect their own organization's financial stability. Because of this financial imperative, agency writers in regional agencies like PSA frequently hold full account and agency management positions, solicit new business for the agency, and manage day-to-day project efforts including internal team and client contact coordination, pre-press development, and publication management in addition to their writing responsibilities. To ensure financial stability, agency writers strive to build long term relationships with as many clients as possible.

Writers hired to serve the communication needs of clients depend on key insights and knowledge about the client in addition to their own professional expertise. Because introspection can be just as difficult for organizations as for individuals, clients often have a difficult time defining their cultures, goals, and organizational knowledge in useful ways for the agency writers. Communication between writer and client can often be limited to phone and email, forcing writers to gather necessary information about the client through strategic planning sessions, Internet research, and personal ingenuity<sup>3</sup>. Agency writers usually have the benefit of experience with a number of clients in a variety of different industries and market positions as well as their professional expertise from which they can cobble together a sense of knowledge and situation to work productively for the client (see Figure 1.3 below for visual representation of agency writers working with multiple clients).

Agency writers themselves tend to be a diverse group with varied professional and personal experiences and wide-ranging job duties. Based on informal data I gathered from

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<sup>3</sup> While there are certainly exceptions to this description, these generalizations are the product of personal experience, anecdotal evidence gathered informally from a variety of contacts at agencies and in-house marketing divisions across the country, and the active qualitative research presented here.



**Figure 1.3:** Working with multiple clients positioned within the agency organizational community.

personal contacts in several agencies, agency writers range from those who are high school graduates with natural creative talent to people with graduate and undergraduate degrees in English, technical communication, journalism, public relations, advertising, marketing, history, public policy, and business, among others. Professional experiences are equally diverse, including positions in media relations, newspaper writing and editing, freelance magazine writing, political communications, entrepreneurial ventures, and other agencies. According to my participants, since agency work is extremely competitive due to the direct financial consequences of one's work, writers seem to share common personality traits such as an excitable imagination, a thick skin, the ability to manage persistent stress, an aptitude for collaboration, and an ever-present determination to do better work.

IMC agency writers are a unique group of writing professionals, and their complex positioning outside the organizations for which they write and inside the multifaceted IMC fields has yet to be studied in depth. As discussed in more detail in the following section, this positioning challenges what it means to be a community member and who has the right to use genres as means of social action.

### **AGENCY WRITERS' CHALLENGE TO GENRE AND COMMUNITY CONSIDERED**

In this section, I unpack the previously discussed positioning of agency writers in relation to community and genre as social action in order to show that agency writers can be rhetorically active writing professionals rather than sellers of genre as a commodity. Because of their ability to cross organizational community boundaries that ostensibly separate communities and genre use, agency writers problematize the organization-centric understanding of genre as social action.

#### **Seeing Agency Writers through the Existing Lens**

If viewed through the lens of current genre and community theories, agency writers use IMC genres to fulfill the economic and creative contract made between agency and client. They may have an underlying rhetorical goal related to the agency's mission of effective and creative work, but seemingly agency writers are paid by clients to use genres to fulfill the clients' purposes of spreading brand messages, reaching audiences, and reinforcing organizational identity through consistent messaging.

Thus, agency writers appear to draw on genres for economic rather than rhetorical purposes in the sense that the goal of genre use is to fulfill the contract, retain the client's business, and make money for one's self and the agency. One observing the work of an agency from a distance might conclude that clients provide capital, basic company and audience information, and a sense of direction which agency writers then develop into documents capable of impressing the client within client-sanctioned constraints. Genres, in this view, are an agency's saleable products, commodities that build the agency's business but serve minor if any rhetorical purposes for the agency itself.

This apparent separation between agency and client might lead an observer to question whether genres can serve any rhetorical function in this arrangement. Can an organization outsource its rhetorical goals to outsiders with genre expertise? Or are agency writers so far removed from client-community goals as to negate the sense of rhetorical action we have understood to date? Because most professional communication theorists would agree that rhetorical elements pervade most communication, perhaps a better question to ask is “whose rhetorical work is actually being done in this agency writer-client relationship, and how?”

### **Suggesting a Variation of the Existing Lens**

Returning to the previously discussed definition of genre helps sort out these questions. First, judging genre to be a socially accepted means of communication implies community ownership of the genre, which in professional communication studies has tended to reside with the organization. Genre and community theories imply that communities develop and adapt textual genres to perform necessary work, and my research reminds us that a community is a broader construct than we consistently acknowledge.

In the case of IMC, the genres are developed, maintained, used, and exercised by what organizational theorists John Van Maanen and Steven Barley (1984) call an *occupational community* rather than a single organizational community. Occupational communities consist of people in similar occupations who come to share values, beliefs, world views, etc. from this occupational association. The IMC genres themselves “belong” first to the occupational community of IMC professionals and then to the individual members using the genres for organizational goals. Since agency writers can fall under the umbrella of

the IMC occupational community, socialized community members have meaningful rhetorical and social access to the community's genres.

The IMC occupational community members draw on a large pool of genres, including different types of advertisements, press releases, promotional newsletters, brand tag lines, and campaign support documents, just to name a few. These IMC genres are used to sell the products, services, and/or images of organizations which are part of the economic and rhetorical purposes of both client organization and the IMC occupational community. If we accept that these genres originate and reside with IMC occupational community members, we can accept that agency writers using the genres for their clients can engage in rhetorical social action because they can engage the rhetorical purposes of their occupational community within the sub-context of the agency-client relationship.

Importantly, just as IMC community members in organizations must conform to organizational culture constraints, so must agency writers negotiate their genre expertise within the limits of the clients' organizational constraints. My findings suggest that to do so, the writer and clients try to build trusting working relationships based on a shared purpose, a shared repository of knowledge, a shared sense of recurring communication situation, and the shared goals to communicate appropriately in these situations. Thus, through these community-like connections, agency writers can and do employ IMC genres rhetorically for their clients.

### **GENRE, COMMUNITY, AND AGENCY WRITERS ADDRESSED**

To explore the challenges to genre and community theories made by the work of agency writers, I conducted a six month qualitative study with five writers in a regional

integrated marketing communication agency. The study was guided by the following research questions:

- To what extent might writing tasks undertaken by agency writers for the social purposes of other organizations still constitute rhetorical genre in the sense of social action?
- How do professional agency writers come to understand their clients in order to successfully use genres for multiple clients and their audiences?
- What community membership is required for successful rhetorical genre use by agency writers for their clients, and how do agency writers negotiate these issues?

By observing writing sessions, interviewing the participants, and collecting texts, I identified relationships that allow the agency writers to function in a decidedly rhetorical space with their clients. Using existing genre and community theory as well as organizational behavior studies on agency-client relationships, I created a theoretical framework to analyze my data which led to three important conclusions:

1. Agency writers at PSA can and do use genres rhetorically by acting socially through both the occupational and the organizational communities.
2. PSA agency writers can use occupational genres for rhetorical purposes in relationships with clients because they develop community-like bonds through shared purposes, knowledge, sense of situation, and sense of appropriate response.
3. The agency-client relationship is *not* a full-fledged interorganizational community because corporate self-interest prevents complete loyalty in the relationship.

Thus, the work of agency writers stretches our definitions of genre and community. My findings enhance our understanding of genre as rhetorical action by expanding our view of community to include the intersections where individuals negotiate useful intercommunity

relationships that allow the communities to share, for a time, rhetorical goals and genres. If it can be termed such, community, in this sense, is a temporary, negotiated achievement that may or may not persist but which does provide agency writers with a context-for-now for rhetorical actions. Also, while genre expertise is gained through community membership, agency writers are socialized by their occupational community and agency community through formal education and/or agency apprenticeship and then by each client relationship. This idea of layered community membership expands our perception of where community membership is centered and, thus, where rhetorical action is centered as well.

To further explore these questions and my findings, I will discuss in this dissertation my theoretical focus, my study, and its results in the following manner. In Chapter 2, I argue that the concepts of genre and community can be stretched to accommodate a variety of situations and relationships not previously included in professional communication literature. Building on this discussion and agency-client relationship theory, I then explain my framework and rationale for examining the rhetorical work of agency writers in terms of their relationships with clients. In Chapter 3, I introduce my research site, PSA, and my five participants. I also make a case for the use of ethnographic methods in this study and detail my data collection and analysis processes.

In Chapters 4 through 6, I present case studies of agency-client relationships observed during the study. In Chapter 4, I examine the developing relationship between PSA writers Paul and Ellis and new client Second Specialty Assurance, to show how relationships build over time and how genre use can be both rhetorical and non-rhetorical at this stage of agency-client relationships. In Chapter 5, I detail the second major relationship I observed, PSA writers Joe and George and client Nature Financial Group, to show how a mature, stable



agency-client relationship shares many of the same characteristics of a community though with important differences. In Chapter 6, I illustrate just how different agency-client relationships are from fully formed communities due to the lack of loyalty inherent in corporate enterprise. I address two client-terminated relationships, both of which were thought by PSA to be stable relationships, and the effects that termination had on the writers and their work for other clients.

Finally, in Chapter 7, I summarize my findings, discuss the implications of my study for genre and community theories, and suggest possible directions for future professional communication research. The major goal of this study is to encourage researchers to acknowledge and seek out professional writers in a variety of under-researched workplace settings because these writers can teach us a great deal about community, genre, and professional communication, just as the writers at PSA taught me. In the next chapter, I expand the necessary literature foundations and theoretical framework for studying these writers productively.

## **CHAPTER 2 EXPANDING THE THEORETICAL FRAMEWORK: RHETORICAL FOUNDATIONS OF GENRE, COMMUNITY, AND AGENCY WRITING**

As initially discussed in Chapter 1, the writers at PSA devote their work hours to writing in the genres of the integrated marketing communication (IMC) occupational community. On an average day, for example, Ellis might write copy for an assurance company print ad, a television commercial script for a retail company, and copy for the new PSA Web site. Joe might write copy for a financial company's annual report, a radio commercial script for a rubber company, and a set of possible tag lines for a new business proposal. Through these genres, PSA writers demonstrate their professional expertise, their creativity, their knowledge of client organizations, and their own membership in the community of IMC professionals.

Yet as also discussed, theories of genre and community form a tacit foundation for much research done in both classroom and workplace settings, and these theories do not seem to accommodate the positioning of IMC agency writers given their distance from the clients for which they use these genres. Because agency writers use their genre set for many different organizations, their work both complements and critiques current genre and community theories in ways that will be explored in this dissertation. Both genre and community have been problematic constructs for composition and professional communication researchers due to the lack of solid boundaries. While problematic, both concepts inspire ongoing research and theorizing and continue to shape the ways we think about and explore writing as a rhetorical concept in different environments.

Unlike genre use within a single workplace environment, the use of genre by agency writers occurs within one agency organization but for the economic and rhetorical purposes

of both the agency and client organizations. From this perspective, surface observation seems to show writers selling their genre experience in an economic exchange since the client uses the documents and messages created for its own purposes. However, my findings suggest that agency writers draw deeply on community elements through relationships built between occupational and organizational communities. The writers strive to form relationships with clients built on commonalities and the shared goals of the writing activities which provide a context for using occupational community genres rhetorically across organizational and community boundaries.

In this chapter, I present a more comprehensive literature review and the theoretical framework used to understand the work of the PSA agency writers. I further review the literature in genre theory and community begun in Chapter 1 to understand why community membership became a prerequisite for rhetorical genre use. I then discuss three common views of community used in professional communication scholarship and suggest how the idea of occupational community can be useful for understanding agency writers rhetorically. Building on these foundations to create my theoretical framework, I introduce four characteristics common among most community perspectives that can be used to evaluate agency-client relationships. Finally, I turn to literature in organizational behavior and agency-client relationship development to outline the four relationship stages by which I categorized and analyzed the PSA-client relationships.

### **RHETORICAL GENRE THEORY REVIEWED**

As discussed in Chapter 1, both genre and community have been difficult to define in academic studies. In this literature review section, I will address further the historical

underpinnings of genre theory and then sort through several definitions by composition and rhetoric scholars most used today in our scholarship. My initial review shows how current genre theory seems to exclude professional writers such as agency writers from using genre as rhetorical action and calls for a new definition of genre to be more inclusive.

### **Outlining Genre Theory's Roots**

The move in composition research to the social perspective caused scholars to rethink the traditional idea of genre and its role in communication. Before this shift, genres were treated in most composition circles as formulas that could be applied in situations by only adding minor details of the actual situation. This understanding of genre traces its roots to the medieval *ars dictaminus* tradition, which produced textbooks clarifying appropriate letter structures and codifying greetings, requests, and responses to socially defined situations that legal and clerical scribes could employ virtually verbatim (Murphy, 1971).

This formulaic approach was revived in earnest after the utilitarian movements of the Industrial Revolution and again at the turn of the 20<sup>th</sup> century when administrative clerks and professionals began to write business correspondence frequently. Early textbooks in business writing and engineering English “emphasized proper form and formulaic phrases,” much like their medieval counterparts, and provided numerous successful examples of communications in a variety of different “genres” such as the request, the denial, and the collection letters (Russell, 2002, p. 126). The genre-as-formula approach dominated composition and professional writing until traditional views like this came under fire in the late 1960s.

### **Crafting Genre as a Rhetorical Construct**

Perhaps the most important intermediary step between genre-as-formula and genre-as-social-action came in 1968 with the publication of Bitzer's "The Rhetorical Situation," which re-centered the focus of communication away from formula and onto situations that are common to groups who develop regular responses to them. The idea that communication was bound to situations inviting communication complemented the social perspective of writing and was used by scholars to reinterpret the idea of genre in composition and professional communication. For Miller (1984), in the most commonly cited genre definition, genres are not simply the textual features of a document but common rhetorical responses to recurring situations developed among community members in order to participate in the work of the community (p. 38-39).

This concept of genre was similarly defined and expanded by other scholars. Using the idea of recurring responses to recurring situations, scholars defined genres as the fully contextualized "dynamic patterning of human [communication] experience" (Devitt, 1991, p. 573); as "dynamic rhetorical structures" on which communities develop communicative responses (Berkenkotter and Huckin, 1993, p. 477); and even as "stabilized-for-now or stabilized-enough site[s] of social and ideological action" (Schryer, 1993, p. 200). These definitions imply that rather than just textual forms, genres are appropriate means of communicating and doing community work in familiar situations. Genres are referenced in this scholarship as a function of communities, as patterns of discourse developed by and common to a community.

More recent genre scholarship by Anis Bawarshi (2003) and Amy Devitt (2004) emphasizes the epistemological dimensions of the practical genre functions of past

scholarship, asserting that genre both constitutes and regulates discourse in communities. In Bawarshi's terms, communities create the "genre function" to act and to help create social action, similar to language use (p. 23). His explanation of socio-rhetorical genre within this idea of genre function reminds us that genre study should address many questions, such as how "genres shape and help us generate our communicative goals, including why these goals exist, what and whose purposes they serve, and how best to achieve them" (p. 23). While his discussion deals primarily with genre's applications to invention and composition pedagogy, Bawarshi helps to open genre to a more inclusive perspective of writers useful in studying agency professionals who are good writers perhaps because of their adaptability to different genred sites of action, a skill he suggests we teach in composition courses.

Similarly, Devitt's work (2004) with genre lessens the emphasis on recurring situation as the primary source of genres and suggests instead that genre is a confluence of choices related to situation, culture, and other available genres (p. 25). Devitt's theory of genre relies heavily on communities and groups for its power, which I will discuss in the community literature review, but she stresses that genre as social action can occur within groups other than traditional communities. She argues convincingly through her revisioning of her previous work with accounting genres that genres function for a group and allow the group to achieve multiple situational and ideological goals in different settings (p. 53).

While more recent conceptions of genre theory such as those by Bawarshi (2003) and Devitt (2004) are potentially more accepting of groups like agency writers, many scholars of genre still seem to follow the maxim that genre is community-based and community-developed and, as such, can only be used by and within that community. New and potentially more inclusive genre studies may result from these newer conceptions of genre, but at

present much of the workplace scholarship applying genre theory still narrowly limits social action and community to the organization.

### **Applying the Genre Concept to Workplace Communication Studies**

Much genre theory-based research used the narrow social notion of genre to explore how workplace writers draw on culturally situated genres to address the communication needs in given organizational situations. For example, Aviva Freedman and Peter Medway's collection *Genre and the New Rhetoric* (1994) includes articles discussing genres specific to a discipline such as Catherine Schryer's study of genres in knowledge creation in two scientific settings, A.D. Van Nostrand's map of genres at a government agency, and Anthony Pare and Graham Smart's discussion of genres functioning in two different government organizations. Like most studies using genre theory as a lens, these studies assume that rhetorical genre use in organizations is accomplished in-house. Writers using genres in these studies were members of the discipline or organization and, therefore, privy in varying ways to the community knowledge needed to use the genres to enact community business.

In professional communication, genres in many ways have been attached to the organizational community being studied at the time. This approach is common in the literature but fails to consider what we already know, that genres can and do cross boundaries of communities, especially organizational communities. To more fully understand genre and its definitions, we must also understand the definitions, aspects, and uses of community in the professional communication literature as well.

## COMMUNITY PERSPECTIVES EXPANDED

The sociological concept of community, as discussed in Chapter 1, essentially assumes that communities are necessary human constructs that orchestrate social activity and provide a means for membership and identification needed for human fulfillment.

Communities develop ways of thinking and doing that allow members to identify each other and to keep non-members out. Most professional communication scholarship turned to the organization as the primary source of community as both Faigley (1985) and Odell (1985) argued that organizations (i.e. corporations, companies, institutions, not-for-profits, etc.) are social units that develop their own communities, cultures, histories, and communication practices deserving study.

The growing interest in the possible rhetorical nature of non-academic fields and the publication of Dixie Goswami and Lee Odell's *Writing in Non-Academic Settings* (1985) led many scholars to take up the project of combining rhetorical and organizational ideas of community. This combination provided a foundation for studying organizations as communities with distinct cultures, dynamic contexts, and varied discursive norms, including genres (cf. Teresa M. Harrison, 1987). The purpose of this section is to lay out in further detail how community and community elements including culture and socialization have been interpreted in existing scholarship and to identify exclusionary flaws that can be remedied by expanding our existing definitions of community and genre.

### Accepted Views of Community in Professional Communication

In general, the definitions of community addressed in these chapters point to several characteristics of community: ordering structure, like-mindedness of members, shared



culture, shared genres, and shared member activities. Building on this interest, several concepts of community developed from organizational behavior, composition, rhetoric, and professional communication that have guided pursuits thus far and perhaps limited our view of community.

In composition studies, many discussions of community developed around the idea of a discourse community, which can be loosely defined as a group of people who come together voluntarily to communicate about and/or to achieve shared goals and whose discursive forms become regularized over time (Harris, 1989). In their concerns for discourse, theorists including Patricia Bizzell (1991) and John Swales (1991) looked to discourse norms, ways of communicating in the groups—genres—as a primary determinate of community. But the idea of discourse community has fallen out of favor with many theorists (Harris, 1989; Killingsworth and Gilbertson, 1992) because of its problematic “abstraction and homogeneity,” as Anis Bawarshi (2003) notes, which makes the concept difficult to apply in complex social structures like organizations (p. 33).

Workplace studies virtually replaced the discourse community with the organization-as-community and community of practice theories because these concepts focus more specifically on professional contexts. Organization-as-community, discussed throughout these first two chapters, is the main community concept governing most professional communication scholarship. This view of community assumes that the organizational entity has elements of culture, purpose, socialization, knowledge, and genres that are required for community status and remains common in current scholarship.

Other scholars borrowed the idea of community of practice from social learning and management theory to examine relationships between organizational members. Community

of practice, as conceived by social learning theorist Etienne Wenger (1999), is a group of people with shared interests who come together regularly to learn from each other and share their skills. This view has been leveraged repeatedly in organizational behavior and management practices that assume organizationally related people can form internal communities to solve organizational problems, enhance organizational knowledge, or create new organizational ideas better than traditional homogenous work departments. Some professional communication scholarship has applied the idea of community of practice directly (ex. Wegner, 2004), while most mentioning the topic do so with a more comprehensive focus on situated learning and activity theory (ex. Kain and Wardle, 2005). Community of practice has a narrow focus on groups that supposedly form spontaneously and similarities to discourse community that have limited the number of studies done using this concept as a primary focus.

Each of these three perspectives of community assume common elements make a community: groups of people with shared interests, shared goals, some shared knowledge, and similar ways of thinking, doing, and being. Two crucial elements that all communities also share are culture and socialization which allow the community to distinguish itself from others and to train members to be productive in that culture. In the following sections, I elaborate on culture and socialization and their importance to existing community theories.

### **Organizational Culture as Boundary**

Community and organizational culture are means of distinguishing one organization from another, while socialization is the means by which newcomers are brought into the organizational community and its culture. Most scholars would agree that one cannot be a

member of a community, and therefore, not use the genres of the community rhetorically, without being fully socialized into the culture—an idea that decidedly alienates agency writers from traditional communities. The assumption that all organizations have their own culture and ways of doing things attracted professional communication scholars to study organizations. In most professional communication work to date, the idea of culture has primarily been limited to the organizational community for and in which the professional writes because within each organization, ways of completing work, of writing, of thinking, etc. vary even within the same industry.

Work in organizational culture was pioneered by organizational behaviorist Edgar H. Schein who, in the most recent edition of his foundational textbook, defines organizational (or corporate) culture as

a pattern of shared basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration, that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relations to those problems. (2004, p. 17).

Schein's definition is stated broadly enough to describe the underlying assumptions of any group of people even though his specific focus is on the organization. For Schein and many professional communication and organizational behavior researchers who followed, culture provides an essential sense of community under which organizational members can rally; culture also provides a shared sense of purpose for communication goals that allows organizations and social communities to align for potential rhetorical study.

As mentioned earlier, Amy Devitt's (2004) understanding of genre as the intersection of situation, culture, and other genres emphasizes an important cultural layer to community and, thus, genre for study. Devitt defines culture as a "shared set of material contexts and learned behaviors, values, beliefs, and templates" necessary for understanding how recurring

situations are perceived and how genres are constructed by the culture of the community or group (p. 25-26). In her view, situations are always surrounded and informed by cultural and ideological contexts that affect a group's perceptions of itself, situations, and genre actions. Organizational members come to know the organizational culture and its recurring situations through the process of socialization.

### **Socialization as Cultural Gatekeeper**

For members of communities and organizations to enjoy full membership in the organizational culture, as Schein (2004) notes, they must first go through the process of socialization. In terms of developmental sociology, socialization is the process undertaken to enculturate children into society through parental teachings and community education systems. The same learning process in organizations and communities, when successful, teaches newcomers to identify with the purposes, goals, activities, and members of the community. How employees come to know and embody the organizational culture is also a matter of socialization.

According to Lester Faigley (1985), socially conscious research should “explore how individual writers come to know [and participate in] the beliefs and expectations of other members of the community” (p. 241). To do so, professional communication scholars including Jean Lutz (1989), Mary Beth Debs (1993), and Teresa M. Harrison and Susan M. Katz (1997) have borrowed from industrial psychology and organizational behavior literature to research writing in terms of organizational culture and socialization. For example, Katz's study (1999) of the socializing value of writing reviews uses these guides to show the writing review as a site for learning accepted conventions and one's role (which can include

assessing and interacting with internal and external audiences) as well as gaining writing authority. Katz's conclusions mirror those of Jean Lave and Etienne Wenger (1991) who posit that employees learn the culture and knowledge of an organization by engaging in stages of organizational participation until they ultimately become experts in the culture and work of the organization, which includes mastering its genres and organizational voice.

Many professional communication scholars accept the idea that the organization is a cultural community of members who have been socialized into the organization, which then allows genre to be attached to and informed by an organization. Assuming organizational culture and knowledge do inform writing activities just as culture and knowledge are assumed to inform community activities, awareness of appropriate communication genres can be assumed to be a product of the organizational socialization process.

Given the theoretical perspective that genres are keys to social understanding and action in organizations, studies of genre appropriation among newcomers comprise a large portion of research in workplace genre use, as work by Lee Odell with state policy analysts (1985), Graham Smart with bank analysts (1993), Dorothy Winsor with engineers (1996), and Anthony Pare with social workers (2000), for example, illustrates. Additional studies by Jamie MacKinnon (1993) and Lee Anson and Chris Forsberg (1990), as well as those just mentioned, have also explored how newcomers in organizations learn genre as a critical part of their workplace development. Collectively these studies have explored how developing the ability to command a workplace's culturally embedded genres is necessary to become a fully participating member of that workplace community.

All of these studies assume that wielding genres rhetorically depends on achieving certain levels of socialization within the organization. Generally, studies of workplace genre

based in any social definition of community so far discussed imply that genres are organizationally bound and owned and that social action with the genres can only be engaged by socialized members of the organization. Yet genres do cross organizational boundaries (i.e. proposals, recommendation reports, correspondence genres, presentation genres, etc.), and many new organizational members are able to write effectively in genres they experienced in other organizations.

Few if any studies I located considered this overlap or the placement of professional writers using genres outside organizations, specifically those writers hired primarily for their ability to communicate to an organization's audiences effectively through certain genres without benefit of socialization in that organization. The literature thus far seems to suggest that there is no space for the work of agency writers like those I studied at PSA to be considered as rhetorical because the writers have no designated place in the accepted views of community, culture, and socialization in professional communication scholarship to date.

For scholars such as Amy Devitt (2004), the existing idea of community, especially organization as community, is inadequate to discuss genres. She turns to the ideas of communities, collectives, and social networks as potential spawns of rhetorical genres; genre in this view earns its rhetorical potential from its interconnectedness to a social group whose participants share values and goals as well as discourse (p. 36, 38). And as Devitt asserts, because people belong to and interact with many groups, "how people negotiate ideologies through discourse when conflicting ideologies are present" within a group, such as an agency-client group, is an exciting area of research (p.41).

Following Devitt's lead, I sought out concepts of community that allowed for variation among members and for cross-organizational perspectives which might explain

how the work of integrated marketing communication agency writers could be rhetorical. The most useful perspective I located was developed by organizational theorists John Van Maanen and Steven Barley (1984) as a way to complement existing managerial and organizational community work. As I discuss in detail in the next section, the idea of occupational community is especially useful for examining the rhetorical position of IMC agency writers.

### **OCCUPATIONAL COMMUNITY AS VIABLE ALTERNATIVE CONSIDERED**

The concept of occupational community complements organization-as-community and adds another valuable dimension to understanding community action in a way that encompasses a broader set of groups than just organizational employees. Developed as a means to change how organizational theorists viewed work behavior, an occupational community is defined by Van Maanen and Barley (1984) as

a group of people who consider themselves to be engaged in the same sort of work; who identify (more or less positively) to their work; who share a set of values, norms, and perspectives that apply to, but extend beyond, work related matters; and whose social relationships meld the realms of work and leisure. (p. 295)

By viewing occupational collectives in the workforce, the authors posit that scholars can better analyze the social worlds surrounding work output and the effects occupational activities have on individuals' behavior and identity perceptions. Since this theory implies that communities with rhetorical potential can be formed around a type of work rather than an organization, occupational community offers a way to look at the IMC field as a community in and of itself, one that transcends organizational boundaries but still provides culture, socialization, ways of doing, and boundaries for members.

### **Four Characteristics of Occupational Community**

In explaining the nature of occupational community, Van Maanen and Barley (1984) suggest four elements to differentiate this view from more traditional organizational views of community. The first element is the self-identification of boundaries. Occupational communities define their own boundaries and determine their own membership rather than subscribing to an outside assessment, or as the authors eloquently put it “an occupational community...is composed of people who consider themselves ‘to be’ members of the same occupation rather than who ‘are’ members of the same occupation” (p. 295). By internally defining community boundaries around certain occupational criteria, the community is not geographically or organizationally constrained, thereby allowing members to share work and characteristics in ways not previously discussed in professional communication studies.

Secondly, members of an occupational community form strong personal and professional identities around their membership. This view argues that people in certain occupations tend to associate with and share a social reality with others who have similar occupations, more so than those who share only a corporate culture. The authors suggest that organizations are essentially conglomerations of employees educated or apprenticed to do specific tasks within distinct occupations which may or may not be central to the organization’s core business. For example, in my industry experience, IMC writers are more likely to call themselves “advertising professionals,” “public relations writers,” or “copywriters” when asked what they do rather than to say “I work in a branding agency” or “I write for a manufacturing company.” Because occupations extend beyond the boundaries



of individual organizations, members of strong occupational communities are not as likely to identify themselves by their companies as by their occupations<sup>4</sup>.

The third and fourth characteristics of an occupational community as identified by Van Maanen and Barley (1984) are closely related. Within occupational communities members tend to use other members as their “reference group” for values, behavior, evaluation, etc., sometimes even outside of work matters (p. 303). Conventional wisdom would agree that many people today who identify strongly to their jobs hold others in similar positions to be peers, lifestyle references, and standard enforcers. As such, people in occupational communities can be expected somewhat to socialize with like-minded people and to carry some of their work interests into these relationships.

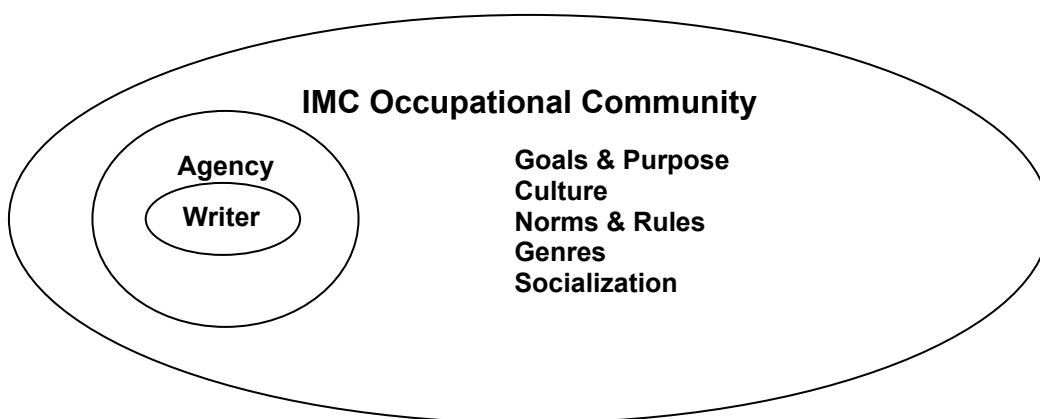
### **Utility of Occupational Community to Study of Agency Writers**

From this brief overview of the concept of occupational community, the value of the concept to the work of marketing agency writers starts to become clear. Occupational communities are communities of like-minded people who share goals, norms, ways of doing things, and even genres just as organizational communities are. But occupational communities are not bound by organizational boundaries, although agency communities tend to be direct manifestations of the occupational community (see Figure 2.1 below).

As noted earlier, the members of the IMC occupational community are usually trained, educated, or apprenticed into marketing, branding, advertising, and public relations occupations, areas which merge cohesively under the IMC philosophy. These professionals can be called a community because they share a set of beliefs, goals, purposes, and genres for

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<sup>4</sup> See also Henry, 2000



**Figure 2.1:** Writing from within the agency community and IMC occupational community.

achieving the social action of the community, i.e. using creative, media-specific communication to help organizations promote their products and services. IMC occupational community members work within organizations, in agencies, and as freelancers to conduct the social work of their community. Participants Ellis, George, and Joe all noted that they believed themselves to belong to the community of advertising and public relations professionals and the agency community based on their formal and informal education, daily work, industry connections, publications read, professional memberships, and personal choices.

According to Van Maanen and Barley (1984), occupational communities can function loosely together in professional associations or unions, in organizations where the occupation is the primary business, or as groups within organizational boundaries (pp. 331-333). Agencies like PSA fall into the second category, providing occupational community members an organizational setting to enact their community goals, use their community genres, and, in the case of newcomers, be socialized into the occupational/agency community. Since the goals of the IMC community include serving organizations, using IMC genres to serve the needs of client organizations falls within the rhetorical province of the

IMC occupational community, thereby allowing PSA writers to function rhetorically within the sphere of their occupational and organizational communities.

### **Occupational Community and Organization Community Together**

Because the majority of professional communication studies have been conducted in organizations with nonprofessional writers, the idea of occupational community is ignored in favor of organizational community. Even though the professionals in these writing studies also bring with them the genres of their occupational communities, most studies have focused on these professionals adapting to the communication activities of the organization. Hence, the organization is seen as the developer of genres rather than as a collector of multiple occupational genres. Without varied professionals bringing knowledge of occupational genres into the organizational community, the organization could be left without much of a genre pool on which to draw.

Conceptually the idea of occupational community helps us to more clearly understand the position of both professional and non-professional writers in organizations. If occupational communities are a source of genres, these communities then allow people to change jobs and organizations more easily than novices because they know the occupational genres and simply must learn to apply them in a new culture. This concept challenges the boundaries frequently set on learning and competently using genres in organizations and even the boundaries of where genres exist. Occupational communities cross organizational boundaries and are useful constructs for studying writers who also cross these boundaries, like PSA's writers.

In the previous sections I have attempted to review relevant literature in both the areas of genre and community theory to show how existing theories used in professional communication may not be as inclusive of all workplace writers as we might hope. By introducing the concept of occupational community, I hope to build a more diverse understanding of community that can account for the work of IMC agency writers and provide a foundation for the rhetorical nature of that work. In the following sections, I provide my working definitions of genre and community and present my theoretical framework for analyzing the challenges faced by the PSA agency writers I observed.

#### **GENRE AND COMMUNITY REDEFINED AND REFRAMED**

Building on the definitions provided by previous scholars, I define genre and community in this dissertation as follows:

- Genre is a social, textual, dynamic, and action-oriented pattern of communication that can be applied and adapted in response to communicative exigencies. Genres are initially developed within communities of people who recognized similar communication situations and a recurring need to respond appropriately to meet the goals of the community and its individual members. Skilled community members might then take this knowledge and apply it to similar situations across communities as necessary.
- Community is a group of like-minded individuals who structure themselves around a shared subset of values, goals, practices, and norms which can be transferred to new members as needed. People can and do belong to many communities and prioritize each community's effect on their personalities and actions according to the role they are playing at the time or according to life stages.

With these definitions, I imply three important ideas necessary to understanding agency writers. First, genre is a dynamic and adaptable pattern of communication that can be used by members of a community to accomplish the goals of that community. Secondly, people belong to many communities and take the genres and purposes of those communities with them into all communication situations they face. In these two ideas, I agree with existing professional communication scholarship, although the second point is less acknowledged than the first.

But in my third point, I expand these assumptions; because genres are community-developed and communities consist of people who belong to many communities, genres can be used rhetorically by one community's members in the other communities in which they act when similar communication exigencies arise. Thus, genres can be applied by one community's rhetors to situations occurring inside or outside the community as long as the genre use meets some shared purpose/rhetorical goal of the combined users.

Using this reasoning, I address three research questions regarding community and genre issues in the work of integrated marketing communication agency writers:

- To what extent might writing tasks undertaken by agency writers for the social purposes of other organizations still constitute rhetorical genre in the sense of social action?
- How do professional agency writers come to understand their clients in order to successfully use genres for multiple clients and their audiences?
- What community membership is required for successful rhetorical genre use by agency writers for their clients, and how do agency writers negotiate these issues?

To address these questions and explore data patterns, I developed a two-part theoretical framework which I fully outline in the following sections.

### **Analytical Framework: Community Characteristics**

By the above definitions, writers in agencies who do the majority of their writing for the economic and rhetorical goals of their clients can use the genres of their IMC community to serve clients if both agree to some shared goal, purpose, and exigence for genre use.

Essentially, IMC occupational community members through education or experience, the PSA agency writers, can use their community's genres for their clients with the blessing of the community, and this genre use becomes increasingly rhetorical as the agency and client form stronger community-like relationships. In these relationships, culture and socialization are not as relevant as other community characteristics that create context for rhetorical genre use:

- *Shared purpose* – According to current genre and community theory, members employ genres to conduct community business and to meet community goals; thus, they have a shared purpose for action. If agency writers and clients share a purpose for the communication the writers create, then genre use is more likely to be rhetorical.
- *Shared repository of knowledge* – Genres used by communities are part of a shared repository of community knowledge that also includes other knowledge of accepted norms, cultural elements, history, and identifying characteristics of members. Through intercommunity relationship-building, the agency writers build up over time a shared sense of relationship-specific cultural knowledge on which they draw to use genres for the social action of clients.
- *Shared sense of recurring situations* – Rhetorical genre theory is grounded in the idea that situations with shared characteristics recur and that community members form appropriate responses to these situations over time, i.e. genre. Thus for agency writers to

act rhetorically from their positioning, they must share or come to share a sense of recurring situations with their clients which they can address together.

- *Shared goal of appropriate response to recurring situations* – Writers recognizing recurring situations use genres as rhetorically and socially appropriate responses. In order for genre use by agency writers to be rhetorical, both writer and client should share the goal of responding appropriately to recurring situations, although their initial ideas of what is appropriate might differ.

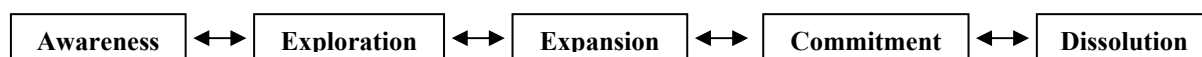
Data collected in this study suggests agency writers strive to form relationships with clients based on these four elements of community, which in turn allows the writers to function occupationally and rhetorically for clients. These criteria also help to illustrate how relationships formed across and around existing community boundaries might allow for rhetorical communication from groups not commonly perceived to be communities. While existing professional communication genre and community theories assume full membership is required to use community genres rhetorically, my research suggests the four community characteristics listed above can serve the same purpose and, thus, allow members to use one community's genres for the purpose of another in certain conditions.

Relationships built around these four community characteristics create a context for agency writers to use their occupational genres rhetorically for clients. I use these criteria to examine the relationships between agency writers and clients and the connection between rhetorical genre use and community in the relationships presented in this dissertation, relationships I categorized according to the following method.

### Analytical Framework: Relationship Development Stages

Drawing on the existing literature on agency-client relationships allowed me to categorize meaningfully the relationships I observed at PSA so that I might present case studies of relationships at different stages of development in terms of the above listed characteristics of community. Organizational behavior literature regarding the agency-client relationship can be traced back to books published in the 1930s which express the importance of strong relationships for the mutual benefit of both organizations (Waller, 2004, p. 96). Relationship research exploded in the 1980s and 1990s, and research related to the stages of agency-client relationships is useful here in creating a sorting system within which to examine relationships formed among PSA writers and their clients<sup>5</sup>.

In this literature, early models of organizational relationships are based on research in industrial sales and behavior, specifically buyer-seller relationships, and represent a shift away from the discrete transaction view of organizational interaction. One such heavily cited model by Dwyer, Schurr, and Oh (1987) identifies five stages of relationship development (see Figure 2.2 below). In this model, parties become *aware* of each other then communicate to *explore* relationship possibilities including goals, expectations, power structures, and norms. Successful relationships *expand* their interactions, and, in situations of continued success, *commit* to long-term partnerships. Finally, or at any stage of the process, one or both parties *dissolves* the relationship, usually because of diminished returns or conflict. From this



**Figure 2.2:** Dwyer, Schurr, and Oh's Five Stages of Agency-Client Relationship Development (1987)

<sup>5</sup> See Spotts, Lambert, and Joyce, 1998; Waller, 2000, for helpful historical overviews, as well as Kitchen, Brignell, Li, & Jones, 2000, for theoretical review



standard model of organizational relationships, scholars developed other models representing agency-client relationships<sup>6</sup>.

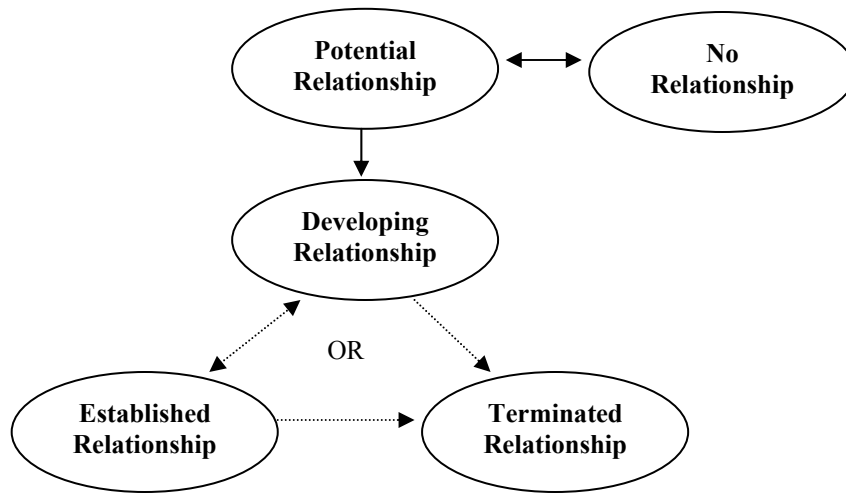
For example, Wackmann, Saloman, and Saloman (1986/1987) developed an oft-cited four-stage model which begins with a Prerelationship stage of awareness and boundary-building (p. 22). During the Development stage, the new partners create their first campaigns together, and when successful, partners continue to create campaigns in the Maintenance stage (p. 22). Finally, or again at any stage, the relationship reaches Termination, usually enacted by the client<sup>7</sup> (p. 22). Throughout the stages, the relationship is continually evaluated on four make-or-break factors: work product, work patterns, organizational factors, and relationship climate (p. 23-24). Each relationship model offers insight into the nature of interorganizational relationships and of business communities that is useful in categorizing the relationships between PSA and its clients.

Drawing on these existing sorting schemes, I developed the following framework to classify agency-client relationships for easier analysis (see Figure 2.3 below). The first category of my framework, *Potential Relationships*, includes all new business efforts undertaken by the agency to add clients to its portfolios. Since the present study concerns genre use and community in the context of existing relationships, I will not explore this category.

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<sup>6</sup> For further research into agency-client relationship development and relational factors, also see West & Paliwoda, 1995; Gould, Grein, & Lerman, 1999; Ewing, Pinto, & Soutar, 2001.

<sup>7</sup> Many studies on agency-client relationships specifically examine factors and reasons for relationship termination. For example, see Michell, Cataquet, & Hague, 1992; Hencke, 1995.



**Figure 2.3:** Revised Agency-Client Relationship Stages and Possible Relationship Paths

The relationship categories that will be explored through individual case studies are:

1. *Developing Relationships* – This category includes clients newer to the agency for which boundaries, shared knowledge, trust, and personal relationships are still being developed. At this stage, agency writer and client feel each other out, seeing how far they can push and learning their constraints. The agency most likely will suggest creative options that might push the client’s current perspectives but will also “pick their battles” when asked to do less independent work (see Chapter 4).
2. *Established Relationships* – Relationships in this category are considered mature and satisfactory on both sides. Both parties trust each other, agree on comfortable working boundaries, and share a knowledge base and mindset regarding brand and messaging strategies. The agency works to nurture the existing relationship and maintain the integrity of the brand messaging. At this stage, the agency still suggests creative options to the client which might productively push established boundaries for the good of that

client's business because the writer might identify personally with the client and its goals. Established Relationships can return to the Developing Relationship Stage under a number of circumstances (see Chapter 5).

3. *Deteriorated and Terminated Relationships* – As the previously reviewed literature firmly asserts, agency-client relationships can sour or end at any stage of development. Since my only access to relationship information was through the PSA writers, this study focuses on relationships that were terminated by the client unexpectedly during my observation period (see Chapter 6).

By examining representative agency-client relationships within stages and using the four community characteristics listed above, I demonstrate the importance of intercommunity relationship-building over organizational community membership to rhetorical genre use among agency writers in this study. While agency-client relationships seem superficially to function economically with writing or communication as the product, this framework allows me to show that the intercommunity relationships can develop several characteristics commonly associated with rhetorical genre and community, allowing agency writers to use occupational genres as social action in jointly recognized recurring situations.

## CONCLUSION

Genre and community are loose concepts in professional communication scholarship, yet current theories tend to favor socialized professionals writing within organizations. Throughout this chapter I have attempted to develop more inclusive definitions of genre and community in order to make a place where the work of integrated marketing communication agency writers can be considered rhetorically. Occupational community theory allows me to

place the agency writers within a definite community, one that transcends traditional organizational boundaries and provides a means for understanding genre use among agency writers and clients rhetorically.

My observations and interviews at the IMC agency PSA yielded case studies that support this idea of occupational community and demonstrate how agency writers can and do write rhetorically in the genres of the IMC community for/with clients. Before further exploring agency-client relationships case studies in Chapters 4 through 6, I next provide critical background information about the agency research site, the five writer-participants, and the methods used to collect the data to support the study's legitimacy and to further explore the world of the PSA agency writers.

### **CHAPTER 3 RESEARCHING THE AGENCY COMMUNITY AND GENRE USE: RESEARCH SITE AND METHODS**

To explore the relationships which integrated marketing communication (IMC) agency writers develop with clients in order to write rhetorically for shared purposes, I collected data using qualitative ethnographic methods. My goal was to understand how these writers approach their roles and tasks for their clients within their workplace, and ethnographic methods are most useful for meeting this goal since personal experience in a setting with members of the culture is necessary to attempt to understand authentically the members' behavior and cultural meanings (Geertz, 1985, pp. 10, 13). More quantitative methods, including survey methodology, could not unearth "the complex relationships between writing and the social contexts in which texts are written" as seen through the personal experiences, strategies, and tacit knowledge of professional agency writers in the same way that ethnographic methods could (Doheny-Farina & Odell, 1985, p. 503).

Qualitative methods are among the primary means of collecting data in studies of professional communication. Many studies that form the foundation of professional communication knowledge employed ethnographic methods to uncover the intricacies of social and personal context in workplace writing tasks (e.g. Paradis, Dobrin, and Miller, 1985; Doheny-Farina, 1986; Devitt, 1993; Winsor, 2003). Many foundational studies employed observation, interviews, and text collection to collect data, as I elected to do as well in order to achieve sufficient triangulation of data.

In this chapter, I will discuss both the research site and the data collection methods. I describe the site selection methodology, establish PSA as the research site, and further introduce the individual participants of the study in order to further highlight the work of the

agency and its writers. In the second half of the chapter, I detail the methods employed to collect, sort, and analyze the data to establish the scholarly integrity of this study.

### **RESEARCH DISCLOSURE**

The impetus for this study originated from personal experience as a managing writer at a marketing communications firm on the West Coast. Through this professional experience, I recognized some of the social and personal issues my fellow writers and I were dealing with as unique to agency writing. My colleagues and I, nearly all experienced writers but new to an agency setting, continually commiserated with each other on issues of socialization, textual ownership, and the complexities of navigating multiple audiences (agency, client, and client audience), creating compelling content, and learning appropriate genres. These experiences led me to consider the gaps in the workplace writing research and eventually to develop the study that would become this dissertation.

In order to maintain objectivity in this research project, I approached agencies which offered different services than my agency offered. This proved relatively easy to do since my agency produced only directed print and Web materials in support of well established brands and messaging strategies, while the majority of agencies in the area where the study was conducted focused on strategic branding and advertising efforts. The agency work is comprehensively different, allowing me to remain objective while collecting data.

### **SITE SELECTION**

Selecting an appropriate site for this research project was critical in order to explore issues of community and rhetorical genre use. Because of the confidential nature of the work

done by agencies for clients, site selection was challenging. IMC agencies of varying sizes and specialties can be found in most metropolitan areas, but agencies all provide services ranging from extremely private to public, from proprietary strategy planning to public advertising campaigns. These issues guided my research proposal and site selection process.

To find an appropriate IMC agency research site, I compiled a list of marketing, advertising, and public relations agencies in a Midwestern city. These firms met three criteria that I deemed important for the project:

1. employed more than 10 employees
2. were founded at least five years ago
3. offered a combination of marketing, branding, advertising, and public relations services.

These criteria allowed me to focus only on financially secure, reputable agencies with established business practices and with both established and developing client relationships. The final criterion allowed me to focus on agencies that offered a variety of writing roles and services in which writers might specialize. Smaller agencies and start-up environments have a different set of issues that I suspected might disguise the relationship building and genre use that I wished to explore. By contacting organizations with a good mix of services, I hoped to find a good mix of relationships and genres to study.

Next, I mailed a prospecting cover letter and a two page research proposal outlining my goals, research questions, methods, and qualifications to executive officers at ten firms that met the criteria (see Appendix A for sample letter and proposal). Two weeks later, I followed up with telephone calls to gauge interest in the project. Three firms were interested in meeting to discuss the project further. One firm had too few writers (2) for a viable case study, but I determined that either of the two remaining firms would make an excellent site

based on services, number of willing personnel, and general enthusiasm for the project. PSA invited me to conduct a six month study with their writers between November 2005 and May 2006, which I accepted.

### RESEARCH SITE

As introduced in earlier chapters, PSA is a 20+ year old marketing, branding, advertising, and public relations agency located in a Midwestern city. With a belief in creating long-term relationships to support client efforts, PSA serves a variety of for-profit and not-for-profit organizations of all sizes in a variety of industries. PSA provides a broad spectrum of IMC services, including

- *Strategic planning* – PSA works with clients to develop individualized IMC plans to build or reinforce brand positioning (the theoretical place/identity created in the market for the client/product/service by the messaging focus).
- *Marketing* – PSA supports branding and advertising efforts by suggesting, creating, and leading marketing efforts, including trade show booths, special events, video productions, and both print and electronic collateral materials: direct mail pieces, brochures, fact sheets, white papers, newsletters, etc.
- *Branding* – PSA helps to identify clients' key selling propositions (the important facts or features that help differentiate the client and its products/services from its competitors) and to craft visual identities, tag lines, and campaigns to share those messages with relevant targeted publics.
- *Advertising* – PSA develops, writes, and designs complete print, Web, radio, and television advertising campaigns from conception to production and placement.



- *Public relations* – PSA writes, manages, and/or supports public relations efforts for clients, such as press release programs, media story pitches, press kits, and special events as well as crisis/issues management plans and services.

At the time of the study, PSA employed 20+ full-time professionals in two categories: administrative/account and creative. The administrative and account services staff included media buyers (people who purchase space for print ads in publications and on-air time for radio and TV spots), media production managers, account managers, and traditional support staff. Members of the creative team included copywriters, graphic designers, art directors, and Web specialists. At the time, the firm employed both full-time and part-time writers, five of whom agreed to participate in the study.

PSA operates a team-based structure, and project teams are typically brought together based on client need and led by co-team leaders, one each from account services and creative. The team leaders then add “functional” people to the team, which might include copywriters, designers, media people, database or relational marketing professionals, etc. depending on the scope of the project. The most basic team would at least consist of writing and art/design leaders, a client contact, and an account assistant. PSA prefers to create teams for clients so that employees become familiar with the client and the clients become familiar with the team; however, other employees are frequently asked to contribute ideas or assistance on account projects as needed. Short-term teams may also be created for smaller projects, to develop new business or internal materials, or to assist an overloaded team.

Project assignments and job duties for employees depend on experience in the occupational community and the client’s industry. Employees have assigned roles and responsibilities that might or might not fall under the more traditional job titles held by

employees in IMC agencies. For example, several writers have project management and new business responsibilities traditionally assigned to dedicated project or account managers. In addition, many employees develop specialty areas in different industries based on their backgrounds and experience. These specialties, in conjunction with general workload and availability, often play a role in project assignments.

During my observation period, I monitored multiple client projects and new business proposals in their entirety. These clients included two assurance companies, a financial services firm, a retail chain, and several environmental companies. Individual client projects included direct mail pieces, event plans, e-newsletters, press releases, annuals reports, and fact sheets, among others. PSA writers and staffers also regularly engaged in everyday project correspondence and project management writing. Additionally, during November and December, PSA writers were heavily involved with strategic planning efforts with several clients; these plans included recommended brand messaging, target audiences, and marketing strategies and tactics to accomplish strategic goals. I also observed the development of at least three new business proposals in response to requests for proposals (RFPs) from potential clients and one opportunity arranged through a contact fostered by one of the participants. The five participants in this study were actively involved in this work in a variety of capacities.

## **PARTICIPANTS**

As noted, five writers at PSA participated in this study, and writing was considered the main task of each participant, although they had other responsibilities as well. By coincidence, these five writers are male. The participants were

- Ellis – creative advertising and television production specialties
- Paul – public relations and marketing specialties, also a client project manager
- Joe – senior advertising and marketing writer, also a client project manager and new business contributor
- Steve – senior writer with extensive management, new business, and client account management responsibilities
- George – senior writer, telecommuting part-time; public relations and research specialties.

Each participant identified writing as a recognized skill or pastime he enjoyed growing up, each has a college degree in a writing-focused or writing-intensive major, and each had work experience outside PSA before joining the agency. In terms of their personalities, the participants all admit to enjoying the variety of projects and topics afforded by the numerous agency clients because, as several participants' independently noted, they "get bored easily." Allowing me to interview and observe them regularly, the participants were open and engaged during the project, even during very busy periods, often sharing copies of what they were working on and inviting me to both on- and off-site meetings. All were thoughtful, reflective, and forthright during interviews and discussions. The following sections introduce each of the participants in more detail.

### **Ellis**

Ellis is the only participant in the study who came to PSA with IMC. He believes his degree combination made him a more marketable agency employee because he has a practiced understanding of both the creative and strategic business sides of marketing and

advertising work. With nearly ten years of agency experience before joining MSA, Ellis thinks of himself as a creative advertising professional more than a “copywriter” because he feels his strengths are in coming up with and developing creative ideas for strategies and campaigns.

The newest writer to the agency, having marked his one year anniversary during the research period, Ellis spent most of his time writing and producing television spots for a retailer and contributing creative ideas for several new and internal campaigns. He regularly contributed ad work and event-planning materials for two assurance companies and an animal health client. I collected 42 transcribed pages of interview data from Ellis and formally observed him for seven hours during the project.

### **Paul**

At the start of the study, Paul had been with PSA for over a year as a writer and client project manager. Paul earned a degree in a liberal arts field from a major private university and served as a public relations communication assistant in a state government office where his duties included regular press releases, reporter contact, and speech and talking points writing. Throughout the observation period, Paul contributed to numerous projects including press releases and story pitches, e-newsletters, direct mail pieces, print ads, and strategy/campaign/tactic development. He managed two clients and regularly contributed work to other client teams and to new business and client presentations. Paul says he appreciates the variety of work the agency affords him as well as the opportunity to shape messages in ways that are meaningful for both the client and the client’s audience. During the

study, I conducted six interviews with Paul for 34 transcribed pages and completed six hours of formal observation.

### **Joe**

A senior writer at PSA, Joe has been in the marketing/advertising/public relations industry in various capacities for over 20 years. Joe earned a writing degree with an emphasis in the environment from a major regional university. Joe held editorial positions with both newspapers and magazines and worked in a number of public relations firms. He believes strongly in presenting information so that audiences understand it clearly and enjoys the aspects of his job that allow him to write that way for a variety of clients.

Joe has been with PSA for ten years and was initially hired to serve the many environmental clients the agency had at the time. He says his duties then and now are very similar to the duties he had at previous agencies: advertising (print, television and radio), annual reports, and collateral material writing as well as strategic ideas generation, new business support, and creative team project management. As a senior creative team member at the agency, Joe also fulfills an informal mentorship role to help new team members get acquainted with the industry. I conducted six formal interviews with Joe for 35 transcribed pages and six hours of formal observation that included an on-site visit to a local client.

### **Steve**

Steve holds degrees in writing and IMC fields and is the only participant to have experience in both agency and in-house settings. At the beginning of the research period, Steve had been with the agency for over ten years. He says he joined PSA because he liked the idea of being able to contribute directly to the bottom line of the business with his writing

efforts. As both senior copywriter and senior management team member, Steve carries a great deal of responsibility at the agency.

At the time of the study, Steve served as the account team leader for four small clients, managed new business opportunities, and led the agency's own marketing efforts. Moreover, Steve's management role requires a good deal of time spent in agency and client management tasks, including being the main gatekeeper for the creative team when necessary. Steve also served as my primary contact at the agency during my research. Steve called me to express interest in my original proposal, met with me to discuss the project further, and championed it with the agency and writers. During data collection, I updated Steve regularly on my progress and consulted him on any questions I had or research avenues I wanted to pursue. Steve also served as the gatekeeper for the final document to ensure that client and agency confidentiality was not breached in this dissertation.

Due to Steve's extensive management responsibilities and sporadic writing activities, we limited our interactions to general and discourse-based interviews; I conducted formal observations only in meetings Steve attended with other study participants. I completed six formal interviews with Steve for 29 pages of transcribed data and observed him formally in several meetings with other participants for four pages of data (in addition to two meetings of a proprietary nature not added to the data set).

### **George**

George has an extensive 30+ year career in print writing and public relations. He worked for many years as a newspaper reporter and editor before transitioning to environmental public relations with a large advertising and public relations firm. George now

telecommutes to support agency writing efforts, especially for environmental clients and research projects. He primarily writes longer form documents including brochures, white papers, research reports, and information sheets. His research reports regularly contribute to new business efforts or efforts to suggest new avenues for existing clients. Since George telecommutes, I conducted five telephone interviews for 22 pages of data, collected one nine-page client project to contribute to the data set, and conducted no direct observations.

Each of these participants brings unique educational and workplace experiences to the agency and clients, and each seemed to identify at some level with the IMC occupational community. Ellis was trained in his undergraduate and graduate education in the IMC community, and he believed himself to be a member of the advertising community. Steve, Joe, and George were introduced into the agency environment with little to no occupational community experience (Steve does have a related degree) and learned about IMC agency work through hands-on experience, mentorship with occupational professionals, and industry reading throughout their careers. Finally, Paul was newest to the occupational and agency communities and was still finding his place during the study through hand-on experience.

Each participant was at the very least connected to the IMC occupational community through the agency, though most had stronger personal and professional connections guiding them. The next section details the data collection methods used to explore individual IMC occupational community experiences, client relationships, and IMC genre writing.

### **DATA COLLECTION METHODS**

In the following section, I outline in detail the methods used to collect data for this study and the means used to sort and analyze the data to confirm the integrity of the case

studies presented in the ensuing chapters. To create a sound rhetorical study, I employed data and methodological triangulation in my research design in order to examine the setting from different perspectives and minimize bias associated with individual methods (Doheny-Farina & Odell, 1985; Bishop, 1993). Methods used in this ethnographic study included:

1. regular observation of participants during writing and project-related activities as well as general agency business activities
2. collection of selected document drafts that participants were working on during observations
3. discourse-based and open interviews with participants about observed behaviors and texts in order to explore community and genre issues in this setting.

Through these methods, I was able to test emerging patterns in the data and asking activity-based questions during interviews (Doheny-Farina & Odell, 1985, p. 510).

Table 3.1 below summarizes the number of hours spent in observation and interviews as well as the number of pages of transcripts and documents collected from each participant. In total, I spent approximately 80 hours at PSA over the course of the study; of those 38 hours were spent directly with participants. I spent the remaining 42 hours on-site informally observing general office milieu, being available to participants for observation at their convenience, and reviewing proprietary documents that could not leave the office. I conducted six to seven hours of formal observation with Ellis, Paul, and Joe, and five to seven formal interviews with each participant. These observations and interviews yielded 199 pages of typed, single-spaced data. I also collected 89 pages of internal and client documents from my participants and typed 25 pages of single-spaced notes regarding proprietary presentations and business plans.



Table 3.1 Participant Observation and Interview Data						
Hours of Time with Participants						
	Ellis	Paul	Joe	George	Steve	
Interviews	11	8	8	5	6	
Observations						
Formal	7	6	6	0	4	
Informal or Proprietary*	10	10	10	0	12	
Pages of Data Collected						
	Ellis	Paul	Joe	George	Steve	
Interview Transcripts	42	34	35	22	29	
Observation Note Transcripts	11	13	9	0	4	
Document Pages Collected	37	11	11	13	46	
Transcripts of Proprietary Documents	0	5	8	0	12	
*Number estimated. Includes informal project meetings with Steve and "office hour" times in Spring. See Scheduling section for more information. Includes overlap for meetings and discussion in which multiple participants were observed simultaneously.						

The following discussion describes my observation, textual collection, and interviewing methods in more detail:

*Observation* – In order to observe the social action in which “cultural forms find their articulation,” I conducted regular formal observations with Ellis, Paul, and Joe during meetings and writing sessions and also with Steve during group meetings (Geertz, 1983, p. 17). During these sessions, I observed the writers engaged in numerous writing activities for a variety of clients. Although the writers frequently commented they weren’t “doing much writing” on observation days, they allowed me to observe them conducting their work whether they thought it was “what I was looking for” or not. As noted above, I observed many integrated marketing communication genres being used by the writers, including direct mail pieces, advertisements (print, Web, television and radio), press releases, strategic plans, and annual reports. I also observed participants writing standard correspondence and memos, memo proposals to clients, and internal project briefs.

I conducted the majority of the formal observations in the writers' cubicles or offices. During these one to two hour sessions, I sat in a position that afforded me a view of the participant's desk space and computer screen but also a position that made the participant comfortable. I took extensive handwritten field notes which I later transcribed, adding my interpretive comments, as suggested by a number of ethnographic methodology texts, including those by Wendy Bishop (1999) and Robert K. Yin (2003).

As a researcher, I employed direct observation and participant-observation techniques to explore the relationship building and genre use from the writers' perspectives. In meetings and group discussions in which other members of the agency participated, I was an outside observer and generally ignored. I created participant-observer relationships with my participants because many of them seemed to feel comfortable talking about their work and challenges with me given my agency experience, though I attempted to speak very little about that experience. Following advice from Stephen Doheny-Farina and Lee Odell (1985), I strived to "develop an empathetic relationship" with the participants while also distancing myself enough to maintain an outsider perspective, which I was able to do because of the participants' open nature (p. 508). Additionally, because several writers were often involved with the same project in different ways, I limited the observer effect by being a relatively constant weekly presence in the office and following up on events with other participants.

*Texts* - To support observations and interviews and to provide data triangulation, I collected or viewed numerous documents from participants including process documents, drafts, and final versions. Documents collected included a memo proposal to a client, a press release draft, a white paper draft, several ad copy drafts, and promotional materials for agency

initiatives. Proprietary documents I studied included two strategic plans, a client PowerPoint presentation, a new business presentation in draft and final form, and the creative section of an RFP response. The documents were either offered by the participant during observations or requested by me to support observations/interviews.

I used texts primarily to stimulate discussion with the participants and to allow me to follow writing and negotiation strategies through the writing process with the participants. I informally analyzed the texts for generic features as well as for writing style and strategy clues. Precedents of similar text collection practices have been set in the workplace studies of numerous respected scholars including the foundational studies by Paradis, Dobrin, and Miller (1985) and Doheny-Farina (1985) mentioned earlier.

**NOTE:** Because of the confidential nature of many of the documents I observed being written, extensive document analysis and discussion is not feasible. While I observed the writing of numerous proposals and presentations for new business efforts and strategic planning for clients, all textual materials are confidential to the agency and its clients and will, therefore, be discussed only in broad terms.

*Interviews* - To further explore data from observation and texts, I conducted a regular series of private participant interviews about their general project work, writing activities, agency initiatives, client relationships, and thoughts on their industry, agency, and jobs as writers. I followed advice from Doheny-Farina and Odell (1985) and Bishop (1993) to conduct both informal open-ended interviews and formal discourse-based interviews with the writers using collected texts and observation notes. My goals in the interviews were to engage the participants in ongoing descriptions of their work; to uncover some of their tacit knowledge

related to their occupational community, industry, agency, and writing strategies; and to provide them an opportunity for reflection about their relationships with clients and genre strategies as IMC professionals.

I conducted at least four interviews with pre-prepared question protocols on the following topics: personal history, writer and community identity, audience issues, and rhetorical analysis of at least one project document per participant. In asking similar questions of each participant in these interviews, I attempted to identify shared patterns that would indicate participant identification with the IMC occupational community and with their clients (for sample question protocols, please see Appendix B).

To become familiar with project work and project cycles, I began each interview, except the initial interview, by asking questions about the participants' work since we'd last spoken. Participants told me how they were using their time, which projects were at what stage of the production process, how client-agency relations stood, and how they were accomplishing their writing tasks. Based on their discussions, I would generate on-the-spot follow-up questions to gather more information on agency-client relationships, socialization, genre, and writing tasks. All interviews were recorded digitally, downloaded to a password-protected computer, and personally transcribed.

### **Scheduling**

To collect my data, I used two scheduling methods throughout the project. For the first two months and last month of data collection, I scheduled one to two hour blocks of time with the participants to observe writing and conduct interviews. Initially this gave the writers time to get comfortable with my presence and overcome the awkwardness of being observed.

For the final month of the study, I scheduled interviews to even out the data as necessary and to conduct exit interviews with the participants. During these months, I was on-site roughly two to four hours per week.

For the middle three months of data collection, I conducted “on-site days” during which I would be on-site for several hours at a time. On these days, I would set up my computer and recording materials at an empty cubicle Steve reserved for my use at the beginning of the study. I would then talk briefly to each available participant to assess plans for the day and set up potential observation and interview times. Over the course of these three months, I was available to the participants for between four and eight hours per week. All observations during this period were collected on Mondays, Wednesdays, and Fridays. This on-site scheduling method allowed participants to schedule observations more naturally rather than having to estimate their work plans in advance. Additionally, being on-site for longer periods gave me the opportunity to observe the participants in staff meetings, informal conferences, and casual conversations as well as to indirectly observe the workings of the office as a whole.

### **Data Analysis**

Because my data is qualitative, I developed a plan for data sorting that allowed me to become very familiar with the data over time and to organize it in meaningful ways. First, throughout the data collection process, I transcribed all recorded interviews and retyped all hand-written observation notes myself in order to search for patterns, plan future interview questions, and keep proprietary agency information private. After transcription, I deleted the

digital interview recordings were deleted from my recorder and my computer. All handwritten observation notes were filed and locked in a small safe.

Secondly, I read and reread the data files repeatedly to look for patterns and interesting challenges the writers faced. From these readings, I developed two coding schemes to sort the data according to themes and patterns (see Appendix C for coding scheme key). Drawing on advice from ethnographic methodology sources (Bishop, 1993; Miles and Huberman, 1994), I first coded by client and client project in order to create the basis for client case studies and to organize a chronological picture of in-process projects during the data collection period. I then coded the data set for themes directly related to agency-client relationship building, genres, and socialization based on the study's research questions. Using this approach, I looked more closely at topical patterns in the data which I could then cross-reference with the client- and project-sorted data.

With this analysis, I developed four client-agency relationship case studies in each of the three relationship stage categories identified in Chapter 2 (two terminated relationship case studies are presented in Chapter 6). These cases show the agency writers interacting with clients and drawing on the genres of the IMC community to serve the shared purposes of the agency-client relationship. In the first case studies, I explore how writers Paul and Ellis develop a relationship with new client Second Specialty Assurance by both drawing on and repurposing knowledge of another client, First Specialty Assurance. This developing relationship shows the challenges agency writers face when attempting to establish an intercommunity relationship with clients to use the genres of their own occupational community rhetorically, as seen in the next chapter.

## **CHAPTER 4 BUILDING A RELATIONSHIP FOR RHETORICAL GENRE USE: PSA AND SECOND SPECIALTY ASSURANCE COMPANY**

As discussed in the previous chapters, agency writers at PSA strive to form close relationships with their clients for the major economic reason of retaining the clients' business. The writers also actively strive to develop relationships with clients to employ strategically and rhetorically the genres of the integrated marketing communication (IMC) occupational community for the goals of the agency-client relationship.

Throughout the course of my six-month study at PSA, I observed numerous agency-client relationships at various stages of commitment and development and that demonstrated their importance to rhetorical genre use for the agency writer. This chapter examines a developing relationship, defined in Chapter 2 as a newer client relationship for which boundaries, shared knowledge, trust, and personal relationships are being negotiated. At this stage, agency writers and client are trying to feel each other out, see how far they can push each other, and get a better sense of boundaries that will guide their interactions now and in the future.

My research suggests that while full membership in the client community is not required for rhetorical genre use by agency writers, certain relational elements are. The following case study of the growing relationship between PSA and Second Specialty Assurance shows how agency writers begin to form a relationship, over time and through joint work, that allows the writers to share a sense of community with the client and, eventually, a shared working identity. Over the course of the five months this relationship was observed, both agency and client struggled to integrate an accepted shared purpose and repository of knowledge into a set of working rules that would allow them to create

appropriate rhetorical responses to agreed-upon recurring situations. PSA writers, primarily Paul as daily account manager and Ellis as creative team leader, demonstrated first in the writing of the strategic plan and then through the initial campaign efforts with Second Specialty that interorganizational relationships can begin to mimic community aspects necessary for rhetorical genre use in agency conditions.

In the following case study, I first introduce the client Second Specialty and establish PSA's relationship with its sister firm, First Specialty Assurance, in order to set the foundation for the developing relationship. Next I demonstrate how the writing of a strategic marketing plan built on First Specialty foundations frames the relationship by establishing the four social characteristics necessary for rhetorical genre use determined in Chapter 2. I then discuss the growing pains experienced by the writers while developing the first campaign with the Second Specialty and how these activities helped to build community-like characteristics. Finally, I summarize how these relationship-building activities established a foundation for rhetorical use by the agency writers by creating a shared purpose, shared repository of knowledge, sense of recurring situation, and goal for appropriate response. As this relationship developed, PSA writers revealed their occupational abilities to form relationships for rhetorical genre use without full client organizational membership.

#### **THE CLIENT: SECOND SPECIALTY ASSURANCE**

Understanding the client is crucial for understanding the agency-client relationship and the client's willingness to engage in community-like rhetorical communication efforts with the agency. In this section, I briefly introduce Second Specialty Assurance and PSA's



relationship with sister company First Specialty Assurance in order to situate the developing relationship in the context of the agency and its industry experience.

Second Specialty Assurance, like First Specialty, is a regional arm of a national company that provides specialized policies. Organizations and intermediary sellers offer Second Specialty's policies as supplements to overall employee compensation packages. Second Specialty's national parent company, which runs regional arms all over the United States, took a relatively hands-off approach to how each arm ran marketing and advertising efforts in their territories until they instituted a national set of visual identity standards at the beginning of my research study.

Depending on the competition in the region, Specialty Assurance branches operate in a variety of market settings and occupy varied market positions. Second Specialty is one of numerous competitors in its regional market and holds a relatively small market share. Because of the broad competition, Second Specialty wanted, at that time, to carve a niche in the market to increase its market share and improve its general standing. To intensify their efforts in the region, the organization decided to hire an IMC agency. Second Specialty previously had run all of its IMC efforts in-house and had never before worked with an agency. Second Specialty selected PSA due to its long and extremely successful relationship with neighboring branch, First Specialty Assurance.

### **Understanding PSA's Relationship with First Specialty Assurance**

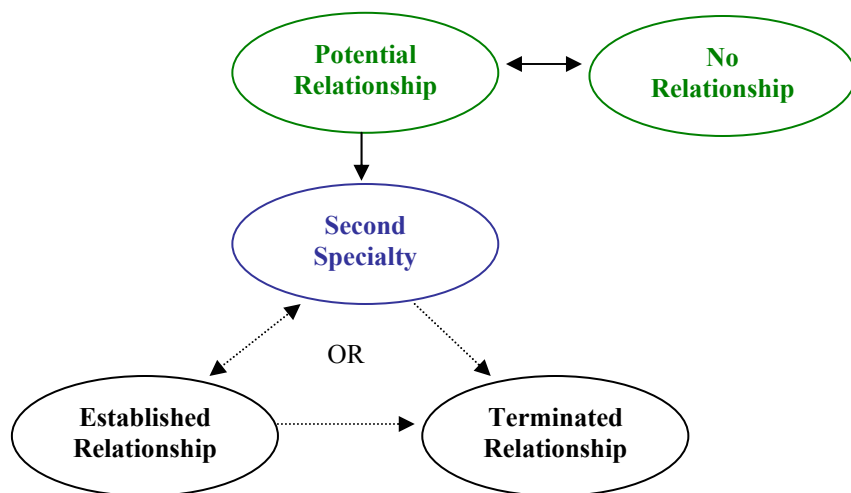
Over the course of PSA and First Specialty's seven-year established relationship, the agency successfully and impressively managed numerous campaigns that helped First Specialty solidify and maintain regional market leadership. PSA and First Specialty's

marketing activities were held as exemplars by the parent company. Agency writer Joe managed the account for several years until transitioning to Paul for daily management and public relations writing and to Ellis for creative management before the study began. At the time of transition, First Specialty also was making internal personnel changes, which allowed Paul to initiate a new working relationship with the new contacts and build on PSA's shared knowledge and established repository of goodwill. After a smooth transition, Paul developed a comfortable relationship with First Specialty and maintained the established relationship.

Because of their work with First Specialty, both Paul and Ellis entered the relationship with Second Specialty with a working understanding of the company's mission and products and an extensive portfolio of work. For example, during the observation period, Paul wrote numerous press releases announcing First Specialty activities and programs, suggested and designed a First Specialty-branded auction item, and handled an issues management situation. Paul always spoke very highly of First Specialty, noting they were an amazing client to work for, that he understood their audiences well, and that he believed strongly in their dedication to philanthropic efforts in the region.

Ellis served as creative team lead and wrote advertising copy, working closely with the design team to create unified, polished campaign pieces for the client. He, like Paul, believed First Specialty to be a good company and appreciated the freedom they gave him to fashion more creative advertising strategies than are standard in this industry. Paul and Ellis's First Specialty experience made them obvious choices to run the Second Specialty account. This connection with First Specialty would prove to be both helpful and challenging as the Second Specialty relationship developed.

In the remaining discussion, I will examine how the relationship with Second Specialty developed and how genres were used during this early relationship (see Figure 4.1).



**Figure 4.1: Second Specialty Assurance Relationship.** Green indicates successfully completed relationship stages; blue indicates current stage.

I look specifically at the development of the initial strategic marketing plan and the first marketing campaign. Through these projects, Paul and Ellis began to build a relationship

with Second Specialty separate from First Specialty that would allow them eventually to draw on their occupational community genres rhetorically but also force them to compromise some of their genre standards for the good of the relationship. To conclude the section, I summarize how these relationship-building genre activities, in terms of the four key community/genres features introduced earlier, help to form the foundations of a solid relationship on which intercommunity rhetorical genre use is possible.

### **Initiating the Relationship through the Strategic Plan**

In this section, I look specifically at how PSA writers developed a strategic marketing plan and campaign ideas which were presented to Second Specialty Assurance. I also examine how that plan defined two requisite elements of community genre use, shared

purpose and shared sense of recurring situation, and laid foundations for both shared goals of appropriate communication and a shared repository of knowledge. These efforts show that agency writers and their clients can agree upon common relationship goals and boundaries, mimicking community foundations, in order to create a context for rhetorical genre use.

Deeply rhetorical and economic in nature, the strategic plan as a genre establishes and fulfills agency, client, and joint agency-client purposes. Strategic marketing plans map out the branding, marketing, public relations, and advertising ventures the agency and client will undertake during a given year. In these plans, key strategic goals are established, campaign themes and strategies defined, and the yearly calendar outlined. For the agency, writing a strategic plan is rhetorical because the writing is audience-targeted and context-based and fulfills an important social action for their community-organization. The plan is also economic because the agency relies on the planning period to create, maintain, and/or potentially expand financial relationships with clients. Clients receiving the plan use it to prove to internal management that marketing efforts are accurately targeting core audiences, meeting defined needs, and proving to be wise expenditures. Finally, as a document of the joint agency-client relationship, the strategic plan (re)establishes and (re)enforce shared purpose, proves an understanding of shared communication situations and appropriate responses, and helps to build a repository of shared knowledge, all crucial to providing a context for interorganizational community rhetorical genre use.

In the case of Second Specialty Assurance, the strategic plan was developed by PSA as a new business pitch in response to an inquiry from Second Specialty. Paul notes that Second Specialty wanted the plan to “outline [PSA’s] involvement as their agency because they had never worked with an agency before.” The document, thus, had the dual goals of

proving PSA's capabilities to serve Second Specialty's communication needs and creating a shared purpose and set of interaction guidelines on which the new relationship could be built.

### **Putting Together a Strategic Plan**

According to Paul and Steve, Second Specialty consulted with First Specialty about PSA's services and then contacted PSA to request the agency put together a set of recommendations for key messages, media outlets, public relations activities, and campaign themes to present to the company. The process PSA writers took to craft the strategic plan showed them clearly using a common genre for the rhetorical social purposes of the agency and the potential relationship.

### *Strategic Option Assessment*

Based on Second Specialty's initial request, the account and creative teams that worked with First Specialty discussed the situation at Second Specialty regarding regional market, current market share, existing marketing efforts and messages, and targeted audiences. They then conducted Web research and creative brainstorming for plan tactics that would meet Second Specialty's needs and secure PSA the account. The team, combining these efforts with knowledge of First Specialty, agreed that both companies shared key audiences: intermediary sellers, groups, and districts; however, Second Specialty's low market share would require different messaging and media strategies than regional market leader First Specialty. The team also agreed on the core brand positioning on which all tactics would revolve: cost savings and overall wellness related to their specialty market.

Additionally the PSA team defined four marketing objectives they would strive to help Second Specialty meet during the plan year:

- increasing the net number of covered regional residents by a certain number
- adding a certain number of target audience groups to Second Specialty's client list
- strengthening intermediary seller relationships
- increasing overall awareness among key audiences.

Based on their assessment, the account and creative sub-teams drafted their sections of the proposal. Paul conducted research on relevant publications in the region to determine appropriate recommendations for media placement. Paul brainstormed public relations activities and special events that might be useful in getting Second Specialty's message out to audiences. Ellis, along with a senior art director, developed campaign themes consisting of visual and textual elements, two of which were chosen to be presented to the potential client.

The genres of print advertisement and informative direct mailers played a major role in this particular plan. Based on the overall team decisions and the creative team brainstorming sessions, Ellis wrote a total of 12 pieces, one ad and one direct mailer for each of the three audiences for the two potential campaign themes, over the course of two days. As I observed Ellis writing on the first day, he joked that he was working on the "first big creative project plan for Second Specialty, so no pressure or anything." While lighthearted about pressure, Ellis later noted that he exceeded the usual work of headings and subheadings provided in a pitch because "the concepts [of the campaigns] were so clean and simple you needed the full copy to understand the pay off." Ellis went beyond expectations by writing full advertisement and direct mailer copy to ensure the Second Specialty decision-makers

understood the full rhetorical and economic potential of the creative campaign themes, showing his awareness of his audience and the goal of the strategic plan.

During the plan development, the PSA writers worked from their knowledge of First Specialty and direction gained by their initial discussion with Second Specialty. While the writers understood how the marketing goals and campaign efforts would help Second Specialty, the writers themselves were writing from a position of the IMC occupational and agency community because until the plan was presented to the potential client, they had little interaction with Second Specialty to add to their position.

#### *Appropriate Plan Presentation*

In order to move the strategic plan from agency genre to a document both client and agency would use as a relationship foundation, PSA needed to present the plan to Second Specialty's decision-makers in a way that showcased their ideas and value to the company. Interestingly, they chose PowerPoint rather than a print report as the delivery medium for the plan. Once all development tasks were completed, Steve, in his role as new business manager, crafted a 67-slide PowerPoint presentation that contained sections on the marketing objectives, core tactics to achieve objectives, media recommendations, the two possible creative directions, suggestions for public relations activities and events, and a preliminary marketing calendar and budget. Handouts of the slides were printed, bound, and distributed at the presentation.

When asked why they chose a long PowerPoint rather than the expected report, Paul's response implied a rhetorical understanding of the audience and the agency goals:

Since this was the first time we brought ideas to them, we wanted to do something user-friendly with visual appeal, color, and photos rather than just handing them a Word document. While 67 slides is a long presentation, we did a combination of short bullets and paragraphs, so we can speak to them off-the-cuff about things like the summaries of tactics, strategies; but there were also places where we needed to detail some fine print, recap the creative direction and how we got to the certain ads, and remind them of the main goals discussed. For those we made sure they were written out clearly.

According to Paul, PSA chose to present itself to Second Specialty through PowerPoint as a reflection of the vibrancy and creativity they value in their process and work. The presentation allowed Paul and Steve to lead a discussion about the goals and strategies in the plan rather than to give what Paul calls “the boring, read-from-the-slide” presentation. In this way, PSA actively demonstrated their work style, which helped the Second Specialty decision-makers discern the relationship potential and organizational fit.

Steve and Paul presented the strategic plan to decision-makers at the Second Specialty offices with positive results, thanks largely to the corporate and rhetorical knowledge PSA already possessed from its relationship with First Specialty. After the meeting, Paul commented, “[the presentation of the plan] went really well. They really liked the ads that Ellis put together and the design. They really liked everything we showed them, and we had a good feeling coming out of there.” Second Specialty hired PSA and agreed to partner with PSA on their marketing, advertising, and public relations efforts. Using their relationship with First Specialty and rhetorical awareness of the situations facing Second Specialty, the PSA team presented a plan that met Second Specialty’s initial needs and helped the client envision the working relationship that would form over time.

### *Rhetorical Outline of a Relationship*

Throughout the overall process of creating the strategic plan, PSA writers engaged in numerous rhetorical tasks. They analyzed the Second Specialty decision-maker audience as



well as regional audiences apart from First Specialty. They fully assessed the situational and contextual factors affecting not only Second Specialty's communication efforts but also those affecting how Second Specialty might receive PSA as partner. Finally they crafted sample documents and a PowerPoint presentation which they felt would best present the information in an engaging way to the decision-makers. Based on these activities, agency writers seem to use their occupational genres to conduct the social activity of their own occupational and organizational communities, but the strategic plan itself also showed how the agency writers laid a foundation for occupational genre use to conduct the social activity of the intercommunity Second Specialty relationship.

### **Establishing Relationship-Genre Foundations**

As discussed in Chapter 2, I assert the genres of one community can be used rhetorically by a member for the goals of another community when four conditions are present: a shared purpose, a shared repository of knowledge, a shared sense of recurring situation, and a shared goal of communicating appropriately in situations. PSA's strategic plan provided the foundation for a relationship in which these four conditions could exist and strengthen over time, allowing genre to cross community and organizational boundaries. Second Specialty's acceptance of the strategic plan and its relationship-defining elements implied the client was also committed to an intercommunity relationship, but my data cannot conclusively support that intention as all data was collected from the agency's perspective. The following discussion explores how the strategic plan functioned as both a rhetorical document and a foundation for future rhetorical genre use by within the PSA-Second Specialty intercommunity relationship.

### *Shared Purpose*

As the first step toward creating the required sense of shared purpose to enable rhetorical genre use across the communities, PSA showed Second Specialty that the agency understood the client's needs and goals, essentially demonstrating to the client that PSA writers took on Second Specialty's goals for their success and relationship. As such, the strategic plan negotiated four important areas of agency-client alignment:

- core communication objectives, messages, and tactics for consistent messaging
- media outlets for advertisements that would provide the best return on investment
- a unified creative direction to reach and interest new audiences
- a calendar of public relations messages and events to maintain consistent media presence and generate positive word-of-mouth buzz.

PSA responded in detail to each of these areas by

- Recommending a brand position and four key messages for all communication efforts
- Recommending select media placement and rejecting some existing Second Specialty media choices
- Offering two visually interesting and textually clever campaign themes centered on the determined brand position and key audiences
- Mapping a full year's worth of advertising and public relations activities.

Through the strategic plan, PSA offered Second Specialty proof they understood the needs of the company and its key audiences and that PSA could add much needed value to Second Specialty's IMC efforts. In accepting the plan, Second Specialty acknowledged PSA's expertise and their potential ability to partner to achieve certain goals.

Through the creation and acceptance of the strategic plan, both organizations joined forces for a shared purpose that would guide the relationship: to use PSA's acknowledged IMC occupational expertise to improve Second Specialty's market position through defined strategic tactics. Both organizations then understood a guiding purpose for their relationship that would help them map their interactions and also test boundaries. Rhetorically, the strategic plan performed the social action of bringing together two organizations under a shared purpose and provided a roadmap for future interactions and rhetorical genre use.

#### *Shared Repository of Knowledge*

While this research demonstrates that full organizational community membership was not necessary for agency writers in this situation, some common knowledge allowed them to write effectively about and for Second Specialty even at the plan stage. PSA had the rare advantage of the knowledge base built with First Specialty in this case. Thus, PSA could show that they were knowledgeable about the industry, the business of a Specialty Assurance Company branch, and the target audiences early in the Second Specialty strategic plan.

Having a shared repository of knowledge about the company and its general goals provided PSA and Second Specialty a sense of relational connection that is not always possible early in an agency-client relationship. Additionally, this knowledge allowed PSA and Second Specialty to work on the first campaign without some of the usual introductory information sharing that can slow early relationships, as discussed in the next section.

### *Shared Sense of Recurring Situation*

In demonstrating that the agency writers were capable and willing to assume some of Second Specialty's goals in order to create a shared purpose, the writers also showed Second Specialty that they understood the communication situations common in the industry by the calendar of events and description of strategies they presented in strategic plan. In most industries, IMC efforts usually are based on a predetermined calendar of expected situations defined by the industry and individual organizations over time. PSA understood the yearly industry cycles through the relationship with First Specialty and was, thus, able to immediately craft an acceptable calendar of situation-specific genre use for the client. The timing of advertisements and direct mailers were attuned to the target audiences' activities, and public relations events were timed around organizational information releases. Developing this shared sense of recurring situation is often a major hurdle agency-client relationships must overcome, but PSA's experience with the industry overcame this limitation, showing the agency to be a useful communication partner.

### *Shared Goal of Appropriate Response*

PSA also showed by their choice of communication themes and specific genres for recurring calendar events that they would recommend responses in line with the established brand position (i.e. rhetorical messaging) and target audiences. PSA writers chose strategies to address communication situations using genres with which Second Specialty was familiar to demonstrate their awareness of existing appropriate responses to given industry situations. Second Specialty already used print advertisements, direct mailers, and press/news releases, so these genres were acceptable forms. Since these forms were acceptable to the client, PSA

writers recognized that they could use the genre implied by the form to focus more clearly on message and target audience. Hence, they suggested familiar forms but planned to use the forms more rhetorically based on shared purpose and goals.

Second Specialty acknowledged and approved of PSA's choice of appropriate responses for the year, but follow-through became challenging when actually developing the communication pieces, as was the case when PSA developed the first set of campaign materials for Second Specialty, discussed in the following section. Though Second Specialty had one sense of certain communication strategies demonstrated by their past marketing efforts, the PSA writers had a more rhetorically sound understanding of the actual genres and their functions due to their occupational expertise and wider experience. Thus while sharing a goal to use acceptable communication strategies and responses might appear superficially simple, PSA and Second Specialty required negotiation before they could agree on what constituted acceptable response in recurring communication situations.

These shared characteristics between two communities mirror the basic requirements for rhetorical genre use according to current genre and community theories, and PSA used these characteristics to write rhetorically in occupational genres for the goals of the relationship without full membership in the Second Specialty community. The next section presents specific examples of how genres were used both to build the relationship and to achieve the shared purpose of the budding interorganizational community. The joint work on the first campaign materials further demonstrates how relationships exhibiting the four key community characteristics can create contexts for rhetorical genre use, even though extensive negotiation between organizations is required.

### **GROWING PAINS: FIRST PROMOTIONAL CAMPAIGN MATERIALS**

Once Second Specialty approved the strategic plan and chose one of the creative campaign themes, Paul and Ellis spent the next three months working on the first ad and public relations campaign with the client. Over the course of this work and necessary client interactions, it became obvious that Paul and Ellis were not fully socialized members of the Second Specialty community nor did they strive to be. During this first campaign, PSA and Second Specialty negotiated every aspect of their relationship within the accepted terms of the strategic plan. At the same time, the two attempted to build common ground upon which the foundational context for genre use across communities could be solidified. In this section, I discuss the occupational genres used by PSA writers to fulfill the shared purpose established by the strategic plan and the relational growing pains they experienced over the course of the campaign.

#### **Drawing on Commonly Accepted Genres to Stabilize the Relationship**

The first campaign by PSA for Second Specialty contained many small pieces, all designed to focus on the core brand messages and to reach the targeted audiences specifically. The initial campaign efforts included:

- A series of four print advertisements placed in audience-targeting publications
- A series of email newsletters, modified from an existing format, to introduce the new marketing campaign to intermediary sellers
- A series of HTML-based email news releases introducing new products and services
- A series of audience-specific direct mail pieces
- A series of three Web banner ads based on the print ads.

Using their occupational expertise, the PSA writers chose the Second Specialty campaign genres for two key reasons. First, the genre strategies corresponded to the shared purpose of the relationship: to use PSA's expertise to improve Second Specialty's market position. Secondly, these genres represented the most appropriate responses to the recurring situation inspiring the campaign, the need to build awareness about Second Specialty in order to increase business among target audiences. Using these guides, Ellis and Paul crafted what they called attractive, effective, and appropriate campaign elements for the client.

The decisions regarding appropriate genres, when implemented, triggered a well-crafted communication sequence to reach audiences effectively. By placing message- and audience-specific print ads in publications and banners on Web sites the audiences read, PSA used the advertisement genres to convey Second Specialty's message to two audiences with which the company did not have direct contact. Doing so drove traffic to the intermediary sellers who offer Second Specialty policies to these audiences. Using the existing email newsletters and developing new HTML-based email news releases, PSA prepared the intermediary seller audience for the new traffic generated by the ads and gave them useful information on new products/services they could sell. PSA added expertise and value to Second Specialty communications by assessing the communication context from their knowledgeable outsider perspective and drawing on appropriate occupational genres.

Thus, PSA writers made rhetorical decisions about the genres that would most benefit Second Specialty and would best reach its audiences based on their foundational client relationship and occupational knowledge, not on full socialization or community membership in the client's organization as implied as requisite by current genre theory.

### **Growing Together Through Negotiating the Agency-Client Relationship**

On paper, PSA and Second Specialty Assurance had established relationship foundations that mimic aspects of rhetorical community, allowing genre use for their shared purpose. But in practice, personalities, working styles, stress, and deadlines often complicated what seemed so clear on paper. PSA and Second Specialty experienced an adjustment period during the first campaign as both parties attempted to translate those foundations into a good working relationship. The agency writers were challenged on several levels to negotiate responsibilities and expertise with the client, which often resulted in frustration but eventually generated more belief in their shared purpose, enabling further rhetorical genre use by the writers for the client.

Paul and Ellis were charged dually with building the relationship through an excellent first campaign and successfully juggling many campaign-related projects/interactions during the first months of the relationship. Paul not only wrote or repurposed the majority of the newsletters and news releases but also managed in-process projects and daily client contact. Ellis, as creative team lead, coordinated the design team and wrote all ad copy for the print and Web ads. Paul and Ellis held similar responsibilities for the First Specialty account and were, they thought, familiar with their roles in the new relationship. That perception was challenged during the campaign in three specific episodes: negotiation of ad copy, a possibly uncorrectable printing error, and the suggestion of a new genre for sharing client information.

#### *Ad Copy Negotiation*

While genre theory suggests that writers socialized into communities accept characteristics of appropriate responses to recurring situations, the PSA and Second Specialty



relationship was new, and both communities' differing ideas about effective genre elements challenged their relationship early on. The first situation that tested the boundaries of the agency-client relationship concerned copy for the initial four print advertisements that Ellis wrote and that Paul managed.

During one observation period, Paul showed me two ads with full text in layout for the Second Specialty campaign, copies of which were covered with red-penned insertions and deletions. He said the client "bombarded us with changes" taking what the agency "felt were well written, focused ad messages" and returning them with "twice as much copy and five more messages than the one we were trying to focus on for each ad." The requested changes were so substantial that Paul consulted Steve and Ellis to decide if they should accept the changes or argue for the original text. When later discussing this give-and-take situation with Second Specialty, Paul said

it's really been hard for the client to hone the message down to just a few key points, especially in an ad. We'd send them ads with a reasonable amount of copy, and they'd send it back with literally two or three times more copy because it got passed around to different people at their office who all wanted to mention something else they felt was important in the ad. We just don't have as much control yet over the messaging as we usually do with clients like First Specialty.

Ellis was philosophical about the changes to his text in the ads but similarly expressed frustration over some clients' determination to put fingerprints on the work:

My philosophy is to make the point simply with a little attitude or personality to it, so if someone wants to read it, it flows well. Some clients, especially Second Specialty at this point, are a challenge because they rewrite the copy in their language which is usually less conversational and more corporate. They think they are being clearer by adding more words, when in actuality they are making it more cumbersome and losing meaning, in my opinion. I'll sometimes spend three hours on six or eight sentences trying to make it feel just right, and then [the client] crosses parts out and adds random points not related to the core message, and the copy just loses its punch. But you've got to pick your battles; you can only push back so many times.

Ultimately, according to Paul, "the changes made the ads more verbose than we would like but weren't major enough to push back against, especially with a brand new client."

This situation was particularly frustrating for Paul because of his close relationship with First Specialty. Paul quickly realized that working with Second Specialty would be very different and was forced to adjust. But he acknowledged these differences and understood why the relationships must be inherently different:

First Specialty looks to us for more guidance, and they told us they really see us as an extension of their organization. But Second Specialty is just trying to create an identity and build awareness and recognition for their brand, while First Specialty is market leader. It makes sense that First Specialty can focus on key messages in all their pieces, while Second Specialty might feel like they have to say everything good about their organization in one ad in case they don't get another opportunity.

Paul and Ellis made conscious rhetorical decisions about effective content for conveying the client's message appropriately to the target audiences based on their shared purpose and shared repository of knowledge as well as their occupational genre standards. But as the agency writer's sense of what is appropriate often differed with the client's, especially at early stages of the relationship, negotiations were challenging. Paul and Ellis needed to decide whether to accept client suggestions whole cloth to protect the growing relationship or to exert their occupational expertise by persuasively explaining to the client why their suggested changes would devalue the core message.

Requesting large-scale copy changes and pushing back against those changes (or not) were tantamount to boundary testing by both sides, each of which is used to being the expert. How parties respond to these situations often sets the tone for future interactions. Ellis looked at these situations both rhetorically and pragmatically, saying he usually only pushes back against client changes if:

the changes completely get away from the message or are completely different from the original intent. If it's a one-off project not attached to a campaign for a client, we know we have to tell them the changes are bad or we simply aren't doing our jobs. But when it gets down to the "I want to say it this way" debate, you may think you are the expert, but it's the client's money and their language. So, in the end, it's usually the classic "I'll tell you 'no' twice and 'yes' the third time" situation. As long as the core is there and you feel like it makes a relatively good imprint, you go with it.

As evidenced by Ellis's philosophy, which was generally shared by the other writers, and Paul's perception of Second Specialty's perspective, the agency writers were hyperaware of the unique rhetorical and often tenuous positioning they occupy in relations to their occupations, agency, and especially clients. Though a shared purpose and plan helped them draw close to a client, the client is ultimately in control of the money, and thus the relationship, especially in new and developing relationships. If trust is established, the negotiations become less frequent, and the client releases more creative control to the agency, as is the case in PSA's relationship with First Specialty.

The negotiation of the ad copy showed each party testing the other and the relationship because at that stage, both PSA and Second Specialty were still individual communities with different goals and views of genre use. While the two might have espoused shared purposes and goals ostensibly, only working together on projects, negotiating relationship roles, and building trust in each other enforced the foundations of the strategic plan and, therefore, helped solidify the actual foundations for rhetorical genre use as an intercommunity unit.

#### *A Potentially Costly Mistake*

Just as PSA's judicious handling of the ad copy negotiations with Second Specialty was precedent-setting, how both agency and client handled a potentially costly mistake helped to define the agency-client relationship. Two of the four campaign ads were sent to publications for print during what Paul called "a really hectic time" because of the heavy workload for the client at the beginning of the year. In this hectic situation, an error in the ads was overlooked by everyone including Ellis, Paul, Steve, the art director, and client contacts.

After the ads had been sent in final form for several publications at print deadlines, the PSA production manager pointed out to Paul that Second Specialty was referred to as “Specialty Specialty” in the ads. Paul contacted all of the publications, all but one of which agreed to pull the ad and accept a corrected version if sent immediately. The dissenting publication contact could not ensure that they would be able to pull the incorrect ad in time.

Paul knew that such an error so early in the relationship could be damaging because of the embarrassment it could potentially cause the client and the poor light in which it would place PSA’s quality control. He first explained the situation honestly to Steve, the account manager, and then to the client. According to Paul, Second Specialty “took it in stride and said they do that all the time. I thought they would react much worse than they did.” Because the client was able to laugh about the error as one their staff had made numerous times, Paul was able to feel more comfortable about the general “craziness” that had surrounded the relationship and project work since the beginning. Second Specialty also showed a level of understanding and trust that might not have been expected in a developing relationship, suggesting Second Specialty was beginning to view PSA as “like them” now that they shared a common mistake. In the end, Paul was able to recall all of the ads and replace them with a correct version, ensuring that the mistake was not published.

The naming error became a shared experience the agency writers and client bonded over. Because Paul honestly admitted the mistake to the client and fixed it, he demonstrated his integrity and that of the agency even in the face of negative consequences, perhaps reinforcing word-of-mouth trust about the agency gained from First Specialty. His actions and the client’s response showed again that both were dedicated to their developing shared purpose and to making the relationship work for the long term. By testing the relationship,

the error actually exposed the commitment to the relationship the two communities had achieved to both communities. Because of this solidifying commitment, the PSA writers were able later to push Second Specialty's view of appropriate response, as is discussed in the next section.

### *Acceptance of a Genre Suggestion*

PSA and Second Specialty's relationship continued to grow over the months of the first campaign as their shared acceptance of a unifying purpose, joint plan, and growing trust yielded stronger community-like bonds. PSA writers, as occupational genre specialists in the IMC community, have a large number of accepted genres to draw on for any given client communication situation, many of which are too new or uncommon to be familiar to non-IMC community members. When a communication situation arose about 10 weeks into the working relationship, PSA writers assessed the situation in the context of their occupational community and agency-client relationship knowledge to suggest a new appropriate genre option. This experience helped the writers positively test the boundaries of the client's trust in PSA's expertise and their shared purpose.

As part of campaign efforts to repurpose the initial print campaign ads into a variety of different genres and forms, Ellis wrote and created with the PSA Web designer three banner ads to be placed on Web sites frequented by target audience members identified in the strategic plan. The banner ads were abbreviated versions of the print ads, and Second Specialty wanted the ads to link directly to their existing homepage so users interested in learning more about the company could do so easily. Ellis and Paul agreed when looking at the existing Web site that a simple link would be ineffective for the target audiences because

readers would not be able to find the information implied by the banner ads without assistance.

Using his extensive IMC community knowledge of new and developing genres, Ellis recommended that the banner ads link instead to a micro-Web site focused on the ad messages rather than the convoluted homepage. According to Ellis, the site they proposed would “go along with the banners, basically with tabs for the three ads which would use images from the main full page print ads so people see the connection to the banners’ messages not just the standard site.” The small five-page site he suggested had its own Web address but would be linked to Second Specialty’s homepage throughout. The client agreed with PSA’s assessment and approved work on the micro-site.

In this case, the PSA writers identified a concern with the client’s existing Web site and understood that the client’s audiences would not be able to easily obtain the campaign information after clicking on a banner ad. They also understood that it was in the best interests of Second Specialty and of their growing relationship to address the concern, especially because they had no power to change the existing Web site. By recommending the micro-site genre as an intermediary step between banner ad and homepage, the writers demonstrated to Second Specialty that they thought about the client’s and client’s audiences’ rhetorical needs as well as the shared purpose of the relationship—to use their rhetorical expertise to help Second Specialty grow.

Through the micro-site, the PSA writers not only addressed the client’s audiences effectively but shared their expertise and new genres options with the client in order to meet what were now becoming shared purposes and goals for appropriate communication. The micro-site demonstrated to the client that the PSA writers were attuned to potential

communication situations that Second Specialty had not recognized, thereby reinforcing the value of an intercommunity partner and the community-like relationship. This small piece of the work added another building block of shared experience to the PSA-Second Specialty relationship, further solidifying PSA's rhetorical foundation on which the writers used the genres of their occupational community for the social goals of the client community and the joint relationship.

### **Working Relationship Status after Five Months**

Toward the end of my research period, I talked with Paul about the relationship with Second Specialty and the work he was doing for them at the time. Paul had found a comfortable rhythm with the client contact as he came to understand why Second Specialty acted as they did and how the two could work together productively. This understanding revolved around determining how the client was most comfortable working with the agency. While First Specialty treated the agency like a branch of their organization, Second Specialty kept the agency at arm's length, reserving most of the control and some of the writing for themselves. While First Specialty gave them more creative freedom, Paul understood why Second Specialty chose to continually repurpose content from the original four advertisements in the other materials created for the campaign: "They are a new client, and that's just the way they want to work with us right now. We're happy to do it."

But Paul also acknowledged how challenging this type of work was for the creative team and for him. Because so much of the writing he did for Second Specialty was repurposing Ellis's ad copy, he noted he sometimes felt more like a client order-taker than a value-adding writer. Paul struggled with the developing relationship with Second Specialty

because he felt the rhetorical and occupational expertise he and Ellis could offer was not fully appreciated by the client. In feeling like an order-taker, Paul recognized that Second Specialty had not accepted PSA as a full partner yet, which limited his ability to write his rhetorical best for this client. But he acknowledged the importance of letting the relationship develop at its own pace, saying that time was needed to build the kind of working community with Second Specialty that they had with First Specialty.

Overall, the PSA-Second Specialty relationship grew during their initial interactions and first campaign of work together. Agency-client relationships, like all communities, experience growing pains as relationship participants struggle to unify practices and share understanding. In many ways, the growing pains and negotiations served as socializing activities for both the agency writers and the client, who attempted to teach the other enough about themselves and their practices to form a relationship of best practices in the future. Just as all novices in organizations must go through a socialization period, so too must agency and client in order to determine exactly what their joint goals are while maintaining enough distance to maintain their community identities in other activities. By working through the ad content negotiation, the naming error, and the micro-site innovation, both companies came to a stable-for-now understanding of their working relationship and built their relationship through shared experiences. In the next section, I summarize the relationship-building achieved during this study and its connection to rhetorical genre use.

### **THE RELATIONSHIP: FOUNDATION FOR RHETORICAL GENRE USE**

The developing relationship between PSA and new client Second Specialty Assurance illuminates many aspects of community and genre use not commonly discussed in



the theoretical literature and demonstrates how relationships between organizations can develop necessary characteristics for rhetorical genre use across communities and organizations. Since our genre theory often is rooted in Lloyd Bitzer's rhetorical situation (1968) and Carolyn Miller's genre as social action (1984) as well as Lee Odell's assertion (1985) that organizations are communities, we may assume incorrectly that to use genres as social action requires direct organizational socialization.

As demonstrated in this case study, the PSA writers are not fully socialized members of the Specialty Assurance Company community. According to Susan M. Katz (1998) and Edgar H. Schein (2004), the socialization process occurs within communities as new members learn the rules and values of the organization, the knowledge of which ultimately allows them to wield genres for accepted organizational purposes. At no time were Paul and Ellis embedded in the Second Specialty community. They spent no time in the company offices nor did they undergo any formal training that new employees would undergo. Neither Paul nor Ellis had any specific education or training in the industry. In the most accepted sense of community, Paul and Ellis are not members of the Second Specialty community, just as Second Specialty representatives are not members of the PSA community.

Yet Paul and Ellis's actions and genre use in this case are in many ways rhetorical, contextual, audience-targeted, timely, and purpose-driven, based in their IMC occupational community. The strategic plan was crafted by PSA personnel to demonstrate their understanding of Second Specialty's industry, business, market position, communication needs, and audiences. The ad materials were audience-focused and context-situated with copy driven by the predetermined brand position and key messages. The micro-Web site was not in the original plan but was determined rhetorically appropriate given Second Specialty's

goals for linking Web banner ads to their Web site. Genres of the IMC occupational community to which the PSA writers belong were used to sway Second Specialty's audiences to consider or purchase the clients' policies. While the economics of the client-agency relationship allow that the agency produces work for money at the client's direction, economics alone cannot account for the rhetorical awareness demonstrated by the PSA writers in their work for Second Specialty.

The writing activities of PSA for Second Specialty illustrate that full client community membership is not required for genres to be used as social action but that certain relational elements are necessary. PSA demonstrated first in the strategic plan and then through the first campaign efforts that intercommunity relationships can imitate aspects of community necessary for rhetorical genre use:

- *Shared purpose* – PSA clearly defined a shared purpose for the working relationship with Second Specialty in the strategic plan which involved using PSA's occupational and experiential expertise to help Second Specialty grow and reach more audience members. All interactions with and writing for the client was then undertaken with this key purpose in mind. The shared purpose allowed the two organizations to feel out the working relationship, to build boundaries and open connections, and even to negotiate productively in order to develop a relationship that was mutually beneficial and increasingly rhetorical. The IMC occupational community genres used to accomplish these purposes in the first campaign—print and Web advertisements, electronic newsletters and news releases, direct mail pieces—built on this shared purpose and were coordinated to match the goals of the agency-client relationship.

- *Shared repository of knowledge* – PSA brought an existing repository of knowledge directly related to this client from their relationship with First Specialty and their occupational experience. Because PSA writers understood the business and goals of Specialty Assurance Company in general, they adapted that knowledge to Second Specialty and proved themselves valuable partners. With their knowledge of the organization's goals, mission, audiences, market position, and key messages, PSA connected with the client and created rhetorical campaign genre documents reflecting the shared purpose and knowledge.
- *Shared sense of recurring situations* – Through PSA's occupational knowledge of the IMC industry and assurance industry knowledge through First Specialty, PSA writers demonstrated their awareness of communication situations facing Second Specialty in the strategic plan and campaign materials. The strategic plan defined genre tactics for addressing each situation, proving to Second Specialty a shared knowledge of recurring industry situations and allowing the organizations to move forward together.
- *Shared goal of appropriate response to recurring situations* – While the strategic plan and recommended IMC tactics formed a foundation for the agency-client relationship, the actual campaign work allowed agency and client to test the relationship boundaries by negotiating an appropriate response to recurring situations. While PSA writers felt themselves to be genre experts more knowledgeable in appropriate strategies to reach client audiences effectively, the client saw itself as the content expert since the communication pieces were about its company. As PSA and Second Specialty negotiated the content of the first set of ads, worked through the naming error, and agreed on the micro-Web site, the communities further built a relationship that allowed them to

determine appropriate genres for their relationship, essentially a combination of the IMC genres and the clients' expectations for those genres.

PSA writers built on their knowledge of client First Specialty, experience with other clients, and occupational community knowledge to forge a rhetorical relationship with Second Specialty. This developing relationship shares characteristics of community but is not a community. It is most likely a short-term, precarious partnership that will only exist until one party decides they can obtain more value elsewhere. The parties in this relationship do not necessarily share a belief system, set of values and norms, or history that are common to communities. But in this relationship exists basic characteristics of a community that enable the PSA writers to use their occupational community genres for the shared goals of the intercommunity relationship for as long as that relationship is valuable.

The agency writers and client tested boundaries but created a valuable, rhetorical working relationship through time and rhetorical give and take. Second Specialty had a difficult time sharing control, while PSA had to decide when to push the client based on their occupational expertise. A mistake tested the relationship, but the bond survived and strengthened through the shared experience. This relationship was still growing when observations ended, but a community-like relationship was forming between the communities of PSA and Second Specialty as rhetorical foundations for genre use.

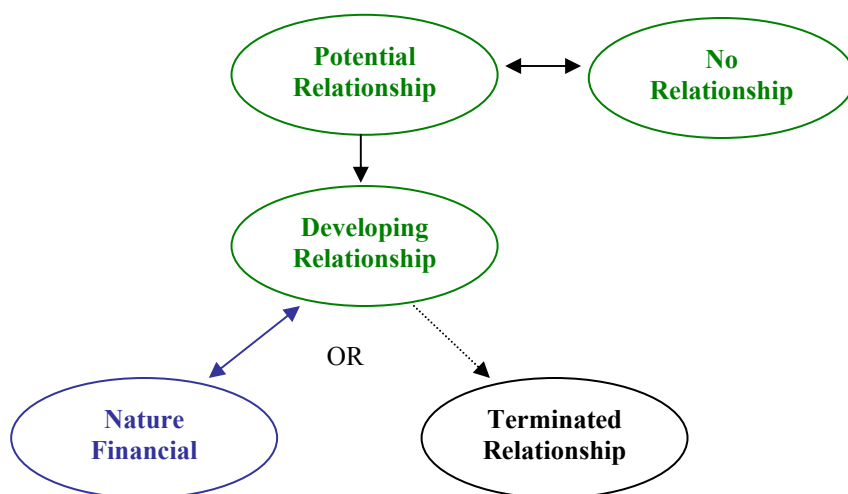
In the following chapter, I explore an agency-client relationship that in many ways exemplifies the relationship that PSA and Second Specialty were striving to form. Agency writer Joe's seven-year relationship with PSA client Nature Financial exhibits the intercommunity characteristics at their most developed and is an example of a relationship in which the agency writer truly wields occupational genres rhetorically.

## **CHAPTER 5 WRITING AS AN OFF-SITE EXTENSION OF THE CLIENT: PSA WRITERS AND NATURE FINANCIAL GROUP**

In the previous case study, agency writers Paul and Ellis asserted both their relationship-building skills and their expertise in the genres of the integrated marketing communication (IMC) occupational community to initiate a rhetorically oriented intercommunity relationship with new client Second Specialty Assurance. Their ultimate unstated goal was to develop a lasting client relationship that provided ample opportunities to serve both the client and their occupational community creatively and appropriately. They strove to form the type of relationship PSA writers Joe and George formed with Nature Financial Group.

The relationship with Nature Financial epitomizes what I termed in Chapter 2 an established relationship. This client had been with the agency, and Joe as lead writer, for over seven years, building such a strong bond that client representatives treat Joe like an off-site member of the organization. The relationship seemed to be based on an extremely high level of trust on the part of both parties: Joe understood the company and its “voice” so well that the client rarely edited anything he wrote for them except for minor changes. The shared knowledge and mutual respect exhibited in this relationship mimics the closest possible sense of rhetorical community an agency and client can achieve. Yet Joe frequently referred to his relationship with Nature Financial as a “double-edged sword” because his intimate knowledge of the organization and its virtually complete trust in him created an unavoidable tension for Joe between his occupational community and the client relationship.

In this chapter, I explore PSA’s established agency-client relationship with Nature Financial Group (see Figure 5.1). To do so, I first introduce the client and then outline the



**Figure 5.1: Nature Financial Group Relationship.** Green indicates successfully completed relationship stages; blue indicates current stage.

history of this relationship, which is essential to understanding the relationship currently shared between agency and client. Next, I discuss two projects

completed during my observation period, George's writing of a technical market white paper and Joe's writing of the annual report, to demonstrate how the organizations interacted along the lines of the four characteristics of community used throughout this study. Finally I examine the tension Joe expressed between occupational demands and client loyalty to exemplify the tightrope agency writers must walk even in established client relationships. While the relationship discussed here seems to be ideal for rhetorical genre use, the closeness between writer Joe and client organization led to interesting challenges.

### THE CLIENT AND THE HISTORY: NATURE FINANCIAL GROUP

The clients that PSA serve function in a variety of different industries, and one industry with which the agency has particular expertise is the environmental industry. In this section, I introduce one of PSA's largest and most long-standing clients in this industry, Nature Financial Group, and discuss how, according to Joe, PSA's relationship with this

client evolved into a trusting, established agency-client relationship that allows rhetorical use of IMC genres by two agency writers for the goals of the relationship.

### **Introducing Nature Financial Group**

Nature Financial provides a variety of financial services to a large set of organizations in the environmental industry around the country. A traditionally conservation-minded and economically conservative organization, Nature Financial has grown exponentially over the last seven years to become a major force in its industry due to a commitment to its customer ownership model and policy of appointing high ranking officials from within the industry. Because officials in the company have worked in environmental fields, customers relate to them and trust their judgment more than in other financial organizations.

Nature Financial prides itself on understanding its customers, their needs, their struggles, and their lifestyles to provide the best services possible. The company serves two major segments in the industry: personal businesses and environmental corporations. These segments have very different needs and interests that Nature Financial must consider in its brand messaging. The company provides appropriate services to each segment individually but endeavors in its marketing efforts to show both segments how important they are to each other's success.

PSA has been the agency-of-record for Nature Financial for over seven years and was initially chosen for its writers' expertise in the industry. Joe and George have pertinent education and professional training in environmental studies which they contribute to their work for the client. PSA provides this client with strategic planning, print and radio advertising work, public relations projects, and long-form collateral work.

Nature Financial is a large client for PSA, and many of the writers in the agency contribute to projects. Throughout the relationship, Joe has served as the primary writer and creative contact, helping to shape the brand messaging and market strategies that have propelled the organization to greater success. During my observation period, Joe wrote print and radio ads and an annual report as well as managed other Nature Financial projects on which George and Paul were working. George handled the majority of the public relations work, including trade show materials, two white papers, and a feature article, while Paul contributed press release writing on several occasions. Nature Financial and PSA have a close bond that comes from years of working together and also from the agency continually proving its worth to the client.

### **Outlining the History of the PSA-Nature Financial Relationship**

The history of PSA's relationship with Nature Financial provides valuable insights into the way the two organizations work together today. While Paul and Ellis struggled to find common ground and experiences with Second Specialty, Joe, George, and Nature Financial moved through that relationship-building stage successfully after years of good work, profitability, and negotiation. According to Joe, PSA showed its value to the client in three major ways during this time: successfully refocusing a poor brand strategy, building consistently on that strategy in all projects, and winning the contract back during a rebidding process three years ago.

First, PSA proved its worth to the client early in the relationship by clarifying the brand positioning that Nature Financial was struggling to voice. After working with an agency on the West Coast that, according to Joe, simply didn't understand the environmental



industry, Nature Financial hired PSA to use its industry expertise to unearth a solid brand strategy that represented the organization's mission and conservative, customer-oriented values. Using Joe's environmental industry knowledge and respect for Nature Financial's customers, he built a brand for the client that spoke to its core values of industry expertise, strength, and conservationism in a casual voice to which the client's audiences could relate.

Secondly, PSA and Nature Financial worked together closely to build the brand messaging into all advertising, marketing, and public relations efforts. Joe noted that by being involved in client discussions and meetings about the company's direction, services, and customers; by understanding the client's financial offerings in relation to the market and the customer; and by "just being fully engaged with the client," he can create meaningful, successful campaigns and communication strategies for Nature Financial. The client nearly doubled its customer base during the relationship and has continued to increase profits every year, for which they partially credit PSA's efforts to represent them effectively in the market.

Finally, PSA proved itself to be the best agency for Nature Financial during a forced rebidding process five years into the relationship. During the years that PSA has been the agency-of-record for Nature Financial, the client has experienced several changes in top executive and marketing personnel, including a new marketing director. To make his mark on the company's marketing strategy, the new director rebid the contract to 15 IMC agencies.

According to Joe,

most new marketing executives want to put their personal stamp on a company's marketing direction. It was a bad time economically for our agency, so we put our hearts and souls into retaining this client. And I personally felt so strongly that a new agency would not have the experience and understanding of the client's needs that I took the process very, very seriously. I had to prove we knew the company, that our knowledge was good for them, and that we were the only agency that could help them continue their upward trend. Our efforts convinced the new director, and we were rehired, which was a hugely gratifying feeling for us.

In this case, Joe used the knowledge gained by being the only continuous thread in the client's marketing history over those five years to prove the agency's undeniable value to Nature Financial and the new marketing director. As such, Joe built and rebuilt trust with the client through his loyalty and understanding of the company and its customers.

Over the course of this relationship, Joe, George, and PSA solidified their relationship with Nature Financial and achieved the four aspects of community discussed in this study through these shared experiences. Sharing a perceived sense of purpose and knowledge as well as sense of recurring situation and appropriate response essentially streamlined project processes for the future. In this established relationship, Joe and George are extremely knowledgeable and trusted extensions of the client's marketing team; this positioning allowed the writers, during my observation, to use their IMC community genres for the relationship and to avoid, or at least streamline, necessary negotiations like those Paul and Ellis dealt with while building the Second Specialty relationship. In the two sections that follow, I discuss two major projects completed by PSA writers for Nature Financial during the course of my study to explore how writing within an established relationship differs from writing within a beginning relationship and to show the capacity for rhetorical genre use in agency-client activities.

#### **GEORGE AND THE TIMBER WHITE PAPER**

As mentioned earlier, George wrote most of the public relations materials for the Nature Financial account during my observation, while Joe served as primary client contact, writer, and creative director. George worked on numerous projects for Nature Financial that demonstrated his expertise in the genres of the IMC occupational community, his extensive

knowledge of the environmental industry, and his deep understanding of the client and its customers' needs.

George's personal expertise in the environmental field and public relations and his place in the long-term relationship with Nature Financial are important factors in establishing the four characteristics of community that undergird this agency-client relationship. Although George does not work as closely with Nature Financial as Joe does, he shares a purpose with the client to provide compelling communications to target audiences. His tenure in the industry gives George an extensive bank of shared industry knowledge and a wide network of contacts he can call on to add credibility to his writings for Nature Financial. Additionally, George has a clear sense of the recurring rhetorical situations facing a client in this industry and the rhetorical means to address these situations through IMC genres in order to satisfy both the agency-client relationship and the client's customers. Because these foundations exist, George completed the market white paper far more smoothly than Paul or Ellis would have at the development stage of their Second Specialty relationship.

In this section, I discuss George's process in researching and writing a timber market white paper for trade show distribution. The process of writing the white paper differed from the process Paul and Ellis experienced with Second Specialty, showing how relationships firmly established in the four characteristics of community allow writers like George to write rhetorically for shared intercommunity purposes from the beginning of a project.

### **Researching and Writing the White Paper**

A major focus of the brand position that Joe created in the relationship's early days was Nature Financial's environmental industry expertise. To demonstrate this expertise in

written form, a few less common IMC genres were chosen over the years, including the white paper genre. White papers are primarily used in technology sectors to introduce a technology or process as a way to inform a company's audiences and to demonstrate knowledge of a specialized topic. These documents traditionally take the form of 10+ page research-based documents that include descriptions, facts, statistics, examples, and visuals to help the readers understand a concept important or new to the field. In the case of Nature Financial, white papers were introduced as a means to prove the company's knowledgeable industry expertise while providing the customer, sales and marketing personnel, and press with educational documents on environmental issues and markets throughout the year.

During my research, George worked on two white papers about the market futures of two environmental industry sectors. According to George, writing white papers for Nature Financial requires special skills to pick a relevant topic for both customers and potential press outlets and to educate the readers on that subject without being overly dry or sales-oriented. The white paper George and I discussed most was written on the timber market, one of George's specialties, for a large trade show. Because of his industry expertise, his experience using the genre for the client, and his network of contacts, George wrote the entire white paper relatively independent of much client back-and-forth experienced by Paul and Ellis.

According to George, the timber white paper was a last minute addition to the documents PSA was creating for the tradeshow. Nature Financial decided close to the date of the tradeshow that they needed another premium item their employees could hand out to producers, customers, potential customers, and media professionals that would allow Nature Financial representatives to discuss the company's commitment and expertise.

George described the planning and writing process as quick and straight-forward; a conference call with the client representatives was conducted, and the agency was asked to create a document similar to the successful white paper George had done on the same market the previous year. Nature Financial provided several customers George could contact for quotes; George noted that usually the client would also provide research contacts, but he drew on his own extensive network of contacts. He conducted interviews with his contacts about the state of the market this year and the outlook for the next year and completed Internet research for additional facts and statistics. After completing his research, he wrote the full draft, shared it with Joe, and then sent it to the client. After another conference call to confirm the white paper was appropriate for the tradeshow, the draft then went into layout and to print.

### **Drawing on Relationship History to Sell the White Paper**

While the majority of this process was more self-contained than Paul and Ellis's process, George did discuss an interesting client concern about the draft that he and Joe diffused because of their experience with the client. The client representative for this particular document was newly hired and unfamiliar with the agency's history with Nature Financial. Other internal team members raised concerns to this representative about the straight-forward honesty of the market outlook presented in the paper, even though this honesty had been the norm in previous white papers. The representative asked for a final conference call to discuss the appropriateness of the paper. George believed

the representative hadn't solidified her position in the company to support the white paper, but Joe and I were able to draw on our history with the client and the success of past white papers written the same way to put out the fire.

When the Nature Financial representative expressed concern over the tone of George's white paper, he and Joe discussed the document with the representative, pointing to how successful similar white papers had been in the past. Drawing on their long standing relationship and past successes with this genre, they reassured the new client representative that the document was an appropriate response in this situation.

George commented that because people move in and out of the marketing department regularly at Nature Financial, as is common in many organizations where time in marketing is just a rung on the managerial ladder, he and Joe represented stability and precedent that reassured the client about the document's appropriateness. Maintaining brand consistency in a case like this, said George, is a crucial agency responsibility, especially with established clients where in-house marketing personnel turnover is common:

Our job is to be stewards of the brand, to keep the brand on track for the client. Clients can't always do that on their own, partly because of that turnover issue. In the case of this white paper, we acted as stewards by creating and supporting a document that showed readers that Nature Financial knows the timber industry as well or better than any competitor by focusing on that key brand position of knowledgeable expertise in this field. I think the best position we can be in for our clients is to be stewards of their brands, which is interesting in cases where we have helped to create or unearth the brand for the client.

In this case, George and Joe's knowledge of the client and the client's audiences superceded the client representative's knowledge, and they quickly negated fears about the effectiveness of the white paper. This example demonstrates the power agency writers can gain in agency-client relationships over the long term, especially when the agency writer has a longer tenure working with a client than the client's employee, allowing the agency writer to bring consistency to responses to recurring situations affecting the client.

In the next section, I look at how Joe's writing of another important company document, the annual report, maintained brand consistency for the client and achieved the

rhetorical goals of the agency-client relationship through their strong, established intercommunity bonds.

### **JOE AND THE NATURE FINANCIAL ANNUAL REPORT**

An interesting genre, annual reports serve both the integrated marketing communication and financial communities by providing an opportunity to reinforce brand messaging in the front-end pages and to fulfill governmental financial disclosure requirements in the remainder of the document. When Joe and PSA began to work with Nature Financial, the client's annual report was a simple one-color insert tucked into an existing marketing magazine the company produced. Over their relationship, Joe helped Nature Financial turn their annual report into an attractive, professional, brand-supporting publication that accomplishes far more than providing just required financial information.

In this section, I discuss how the history of Joe's involvement with Nature Financial's annual report echoes the development of the established agency-client relationship they now share. First I provide a short history of Joe's relationship with Nature Financial and then detail Joe's efforts to change the client's perception of the annual report genre from financial requirement to brand reinforcement opportunity over the years. I next discuss the process of putting together the most recent annual report and examine Joe's experience writing the annual report in terms of the four characteristics of community.

#### **Identifying Personally with Client Goals and Customers**

Of the relationships I observed between agency writers and their clients throughout the research period, no relationship was as deep as that between Joe and Nature Financial. As

noted, Joe has been the primary writer and creative lead on this account since the beginning because of his expertise in the environmental segment:

I feel ownership of the Nature Financial account, and I think most of the loyalty comes from believing in them as a company and in their products. I feel protective of the work I do for them and want to make sure it's right for their needs. You create a personal relationship with the client built on trust, and I try to not do anything to ever violate that trust with a client like this.

Because Joe believes Nature Financial is a respectable company that understands and serves audiences with whom he feels a close affinity, he writes passionately, accurately, and rhetorically for the client. Like George, Joe identifies closely with the company and its values as well as the customers it serves because of his upbringing and education; therefore, he was uniquely positioned in the agency to build a strong, intercommunity relationship with Nature Financial in which genres could be used rhetorically. His work evolving the client's annual report demonstrated this close personal and rhetorical connection.

### **Evolving an Afterthought into a Rhetorically Valuable Document**

Nature Financial's annual report has undergone a marked transformation from a small magazine insert to a full-color professional publication over the last seven years with Joe and PSA. Since this document is required by law every year, the progression of the document from utilitarian to artistic and brand-enhancing in many ways mirrors the development of the working relationship between the agency and the client. While initially Nature Financial did not take advantage of its annual report as a marketing tool just as its original agency failed to create a solid brand strategy, the most recent incarnation of the report showed just how far the document and the PSA relationship have come in terms of trust and respect.

According to Joe, the first annual report that he and PSA created for Nature Financial was completed during the early developing relationship stage. Trust and shared purpose had



not been solidified in the relationship, so the report was done much like it had been in previous years before PSA, except that Joe convinced the client that an annual report untied to an existing magazine was a better approach. Joe commented that at theist stage in the relationship, the client, especially the executives and marketing staff, did not fully trust PSA to represent them well. On this early iteration of the annual report, the marketing staff worked like the client representatives from Second Specialty with Paul and Ellis on their first joint campaign, limiting Joe's ability to add creative elements and brand messaging. Thus, the first annual report PSA created for Nature Financial was a challenge as the client and agency were learning to work together and to trust each other.

Over the next few years, Joe says he used the growing relationship with the client to recommend changes to the annual report to fulfill the brand-building potential of the genre. First, they moved away from pictures of executives and employees. Then Joe added pages to the document to “slip in more messages about what they are doing and how they are growing, so the customers reading the report could feel pride in the organization.” The report then grew creatively to include more professional images reflective of Nature Financial's customers and core values and to include more color.

Joe noted that the annual report became not just an opportunity to share the client's good financials but also “a chance to talk about the brand and tell people who they are”:

Their annual report is as good or better than any other company's in terms of design and content. It took time and incremental changes; they were reluctant to make any changes at first. But we have raised the bar so high that we now meet with all the senior executive directors plus the marketing team to plan the report every year. It's a neat opportunity to get in front of that level of people when no one really cared about this report when we started.

As the client came to trust Joe's expertise and to recognize his respect for the company, Joe developed a strong working relationship, positioning himself as an off-site member of the

organization in the client's eyes, as was demonstrated while writing the most recent annual report with Nature Financial.

### **Writing Rhetorically as an Off-Site Extension of the Client**

Joe's relationship with Nature Financial has grown so strong and exhibits the four characteristics of community so compellingly that his work for the client closely mirrors that of a fully socialized member of the organization rather than an outsider agency writer. Said Joe about the relationship:

I have a very strong relationship with this client, and I know the company so well. Because of that trust and mutual understanding, they allow us so much freedom to write things for them, and it's up to us to continually upgrade and help their brand. It's almost like I work for them in a sense.

In the process of writing the most recent annual report, Joe demonstrated how his knowledge and the client's trust allow him to act as a virtual employee of the client.

Over the course of the roughly three-month annual report project I observed, Joe wrote eight pages of brand-building text focused on critical client messages, including the CEO's Letter to Stakeholders, after only two meetings with the client. The first meeting was held in the late fall at Nature Financial's headquarters and included Joe, the client's executive management team, and members of the marketing and sales teams. Joe used the meeting to talk to the client about the closing year, the important messages they wanted to emphasize about the company, and their outlook for next year:

In my discussion with the CEO especially, I really listened to what he was saying in the meeting, asking questions to get him talking about the company and the year, then I just took those ideas and expanded them...and then the financials prove it because they have the numbers to back the claims up. I combine that with my knowledge of the disciplines that the company really cares about to write the CEO letter and the content spreads that come before the financials. So it was just a matter of expanding the little things that we talked about into the spreads that would make a difference to the reader.

The messages Joe and the client chose to reinforce in the brand-building content in the front of the report included the strength of the customer-ownership model, conservationism, and dedication to new small businesses.

After this on-site discussion, Joe and the agency art director worked up content and visual themes from which the client could choose. Joe presented Nature Financial with three design options of varying page counts and convinced the client that adding four pages to the front of the report, in addition to the existing four pages, would allow them to “talk about more of the things that the company was interested in and that the customers would like to know about.” The client agreed with Joe’s recommendation and trusted Joe to proceed: “After those initial meetings, it’s a very hands-off process for them because they trust us.”

Nature Financial’s trust in Joe was so complete that his draft copy for the front eight pages was returned with approval and only minor edits. The edits themselves, noted Joe, only enhanced the content because the client inserted actual numbers and amounts where he had only percentages. On being able to create drafts that require little to no revision from the client, he said,

That comes from just really liking the client, understanding what they do, identifying with their audience, an environmental audience...I think it makes a huge difference, having an affinity or affection for the people the client is selling to or who the prospects are. I share this client’s values and know that it’s a tough business from personal experience. So I can assume their persona easily because I can relate to them.

Ultimately, the financials were included in the annual report, it was successfully printed and distributed, and Joe claimed it was well received by Nature Financial.

Given Joe’s familiarity with the company and its core customer base, he combined client theme information with his own knowledge to write a document that met the client’s and the CEO’s immediate approval. He believed the annual report now fulfills an important

rhetorical goal for the client and for the client-agency relationship: “The report isn’t so much just a number carrier as much as a way to also enhance Nature Financial’s brand and to move the brand forward.” Joe’s rhetorical work on the annual report over the years illustrates his close ties to Nature Financial and the four characteristics of community discussed in this study, as I outline next.

### **Acting and Writing within a Strong Intercommunity Relationship**

Joe’s relationship with Nature Financial illustrates how an agency writer and member of the IMC occupational community writing externally for a client can build an intercommunity relationship based on the mutual trust and respect which are embodied in the four characteristics of community. First, Joe and Nature Financial agreed to a shared purpose for their relationship over time. Having a preexisting respect for the industry and for the customers Nature Financial serves, Joe showed the client early in the relationship that he appreciated its customers, mission, and core values by developing a brand message strategy that clearly reflected this understanding. As Joe’s honest respect for the organization was recognized, the client took Joe’s suggestions for evolving their brand messaging in their communications; for example, Joe suggested upgrades to the annual report every year based on his understanding of the client and the needs of their audiences. In this way, Joe and Nature Financial shared a purpose to improve brand messaging and client communication.

Secondly, due to Joe’s personal experience working and writing in the client’s industry, he shared a repository of industry knowledge with the client early in the relationship that helped them speak the same language immediately. Joe says he was well versed in environmental issues and challenges facing large and small businesses, only having

to learn the financial aspects and products that Nature Financial offered. Because of this initial shared knowledge, Joe showed the client he understood their industry and customers which provided another element of trust, much like Nature Financial's policy of only hiring executives from within the industry helped build trust with the customers. As the relationship grew over time, Joe's industry and client knowledge came to rival that of client employees, allowing him to write important documents such as the annual report with limited or no direct interaction with the client, a rare state that Joe views as a double-edged sword, which I discuss below.

Next, Joe's insider industry knowledge and occupational community genre knowledge helped him establish a shared sense of recurring situation with the client and develop a sense of appropriate response. Through his personal knowledge of the industry and his past IMC agency work with other companies in the industry, Joe understood important cycles and times of year that would require client communication as well as with the types of situations that might arise outside of those regularities. With this knowledge, in addition to his expertise in the genres of the IMC occupational community, Joe recognized the client's reasoning behind its sometimes conservative responses to those situations and offered the client appropriate and multipurpose approaches to the genres they were using to deal with recurring situations.

Joe demonstrated his awareness of recurring situation and appropriate response keenly as he worked with the client to improve the annual report. Over the course of several years, Joe helped to evolve the annual report from what he called "a virtual afterthought" to a respected and informative publication that served both the company's brand message and financial reporting requirements rhetorically. Joe helped the client recognize the opportunity

presented by the required annual report and turned the document into a valuable marketing and sales tool in response to a recurring industry situation.

In many ways, Joe had become, over the years, an extension of the client. He was treated very much like an internal employee who happened to work off-site. He was privy to client politics and proprietary knowledge to which only employees normally would have access, and he had an insider's repository of knowledge about the client. Joe appears to be a socialized member of the client organization, and in some way he is, having been told by client representatives that they view him as one of their own. Because of this connection, felt on both sides, Joe can write for Nature Financial in the genres of the IMC community in a truly rhetorical sense.

Yet Joe was intensely aware that he was not a member of Nature Financial's organization, a position he frequently discussed in terms of the challenges his intimacy with the client and his external agency placement caused. While the discussion in this section illustrated how closely an agency writer and a client can share rhetorical goals and use genres rhetorically, another side of this coin affects Joe's relationship with Nature Financial as much as his close identification with this client.

### **THE DOUBLE-EDGED SWORD OF ESTABLISHED RELATIONSHIPS**

Throughout the study, Joe enjoyed a trusting, established relationship with PSA client Nature Financial Group. But Joe noted several times in our discussions that this position with the client often worried him, frequently referring to it as a "double-edged sword." This section illustrates that while forming established relationships with clients might be a goal for agency writers, the achieved intercommunity relationship presents its own set of challenges

to maintain its strength and rhetorical significance, especially for agency writers as IMC occupational community members.

As quoted in Chapter 2, George best sums up the ideal positioning of an agency writer in relation to in-house writers:

The in-house people have access to all the insider information, but they don't bring an outsider perspective to it. They might have difficulty figuring out why that product or service or point is important to someone who isn't getting a paycheck from their company. Magazine writers are at the other end; they are generalists. What we do as agency writers is try to bridge the gap between the disinterested outsider and the over-interested insider.

If as George claims, preserving an outsider perspective is critical to differentiating the work of agency writers from that of in-house writers, losing that perspective would damage agency-client relationship.

According to Joe, this loss of perspective, the other edge of the sword, can lead to complacency, repetition, the loss of one's creative edge, and possibly the end of a relationship. As primary writer for client Nature Financial, Joe believed he must be careful not to let his close connections to the client obscure the IMC occupational community outsider position that garnered him and PSA the account in the first place. He said

I try not to let my familiarity with the company be too comfortable. It's a benefit to have someone who knows the reoccurring themes for the company and the products, but there is also a danger if you rely only on that knowledge. It gets stale. Problems can happen if you take the client or your knowledge for granted. You have to come up continually with things that are fresh, new, relevant and useful for the reader, or you might lose that client.

All of the participants in this study similarly noted at one time or another that the worst thing IMC agency writers can do is rest on their laurels. Both Joe and Ellis noted that a writer is only as good as the last well-received piece of work. Steve noted that it is the agency's duty to give the client something they couldn't have done themselves by drawing on their outsider status, creativity, and occupational expertise. These professionals believed that agency writers must constantly be aware of developments and innovations in their occupational

community as well as their own personal relationships with clients so that the work they produce does not become stale and repetitive. Stale or repetitive work can lead to losing the client, losing the agency money, or even losing one's job.

Given this stressful imperative to do increasingly better work for all clients, especially clients with long-term agency relationships, Joe found it is important for him to feel a sense of excitement and generative fear every time a creative piece is assigned, whether he had written similar pieces successfully for the client in the past or not:

With every creative assignment I have a little healthy panic and fear to make something good. The writing shouldn't be automatic; there should be no "been there, done that" attitude. For me, there's always a sense of "what can I do to make this one better than the last? How am I going to do it? What can I write that will make a difference?" You want the work to be good, and every page, image, and word to have a purpose so you don't disappoint [anyone].

To accomplish this goal, Joe draws on his occupational community to apply new approaches and interesting ideas to project work "so that the client knows we are doing what's in their best interests rather than just relying on history."

Nature Financial's level of trust and respect for Joe also meant that few other writers in the agency could write advertisements and brand pieces for the client as quickly and knowledgeably as he did. During a family emergency that kept him away from the office for over a week, Joe returned to the office on one of those days to rewrite several short pieces that other agency staff members had written in his absence:

The writing the others had done wasn't bad or anything, and I of course appreciated their efforts. But some of it wasn't as relevant to the client's audience because it wasn't an environmental person doing the first draft. So I needed to bring it back a little closer to the way we talk to Nature Financial customers on behalf of that client, changing the content to better fit the style of the client. It's much harder for someone else to write the brand-oriented pieces for this client than it is for me to just do it myself.

If Joe were to leave the agency or the client account for some reason, the PSA-Nature Financial relationship would mostly likely revert back to the developing relationship stage as



the new PSA writer would not have the same extensive knowledge and trust Joe enjoys now. Joe uses occupational community genres inherently for the rhetorical purposes of the shared relationship, but a new writer without the same level of knowledge or respect would have a difficult time being rhetorically effective in this situation.

Thus, as Joe's challenges illustrate, established relationships with clients provide agency writers with a solid foundation of knowledge and respect with which to work, but also lead to issues of potential complacency, too much trust, and indispensability that force the writers to remain constantly on top of client relationships and their agency positions. Additionally, Joe's relationship with Nature Financial demonstrates that long-term agency-client relationships can fall into the trap of becoming a one-writer-client relationship, leaving both sides vulnerable. Based on the generally unstable climate of the agency business, agencies can put themselves into dangerous positions if one writer controls any relationship, which Joe recognized.

### CONCLUSION

Agency writers are hired by clients to use their outsider perspectives, occupational community genre and writing expertise, and creativity to enhance the client's IMC efforts and to reach audiences with strong, cohesive messages. As agency writers come to build intercommunity relationships with clients based firmly on mutual efforts and success, agency writers can be tempted to rest on that relationship and past success. Joe reminds us that the position of an agency writer is always somewhat tenuous, no matter how trusted the writer is or how long-term the relationship. Agency writers must always be on guard against complacency or overconfidence in their relationships with clients because those feelings can

change the positioning of the writer and can eliminate the very reasons the agency was hired in the first place.

Joe's relationship with client Nature Financial demonstrated that agency and client can come very close to forming a fully functional interorganizational community when the writer is highly invested in the client's success and when the client trusts the writer as a socialized member of the organization would be trusted. In this type of relationship, all four characteristics of community are present in spades, as the agency-client relationship has firmly developed and maintained a shared sense of purpose, shared repository of knowledge, shared sense of recurring situations, and shared sense of appropriate response.

Because Joe shared these characteristics with the client and its representatives, he used his occupational community's genres and perspectives to build the client's brand and to help strengthen the company's overall market position dramatically. Joe's writing for Nature Financial was singularly rhetorical: he used genres that translated from his occupational community to the client's organizational community, he developed a voice for the client that connected directly with its audiences, and he believed in the brand because he believed strongly in the company. Joe became as close to the client as an agency writer can without becoming a client employee and proved his dedication to both his client and his occupational community by constantly recognizing the need to stay current, relevant, and fresh in his writing.

The challenges that both Joe and George faced in their relationship with Nature Financial remind us that relationships, like communities, require maintenance, respect, and effort to survive. Agency writers strive to achieve mature relationships with their clients, as Joe has with Nature Financial, but must continue to grow as members of their occupational

communities to stay relevant and necessary to their clients. Joe reminded himself of this fact frequently, as he discussed above. Because perhaps above all else, agency writers are not actual members of the organizational communities for which they write; their position is always tenuous, no matter how strong the intercommunity relationship might seem or how indispensable they might believe they are to a client.

In the following chapter, I discuss two established relationships that were ended by the clients, illustrating that while important for rhetorical stability at the time of each project, a sense of community in the agency-client relationship does not guarantee loyalty.

## **CHAPTER 6 REMOVING THE FOUNDATIONS OF COMMUNITY AND GENRE USE: PSA AND TWO TERMINATED CLIENTS**

As the cases of Ellis and Paul with Second Specialty Assurance and Joe and George with Nature Financial Group illustrate, these integrated marketing communication (IMC) agency writers developed strategies for forming community-like bonds with clients that enable rhetorical use of IMC occupational genres for clients. These writers engaged in work activities that help the agency and client develop a shared purpose, a shared repository of knowledge, a shared sense of recurring situation, and a shared sense of appropriate response to recurring situation that in many ways encompass the notion of rhetorical genre established in the published literature to date. Joe especially exhibited strong community-like bonds in his relationship with Nature Financial, becoming as close to the organization as possible without becoming an in-house employee.

But throughout this study, the agency writers were careful always to draw attention to the fact that the agency business and the IMC occupation are fickle and demanding. Agency veteran Joe called the business “a survivor’s club,” commenting that one rarely sees writers retire in the agency business due to the constant pressure to stay fresh and relevant in the face of ever-changing market trends. According to Joe, most writers leave agencies for a less stressful in-house marketing department or shift careers altogether to escape the demands agency life makes on one’s time and creativity. Burn-out and firings are common.

While cases like Joe and Nature Financial show just how close agency and client can come to building a fully formed rhetorical community, the impersonal nature of business often trumps these bonds, usually when least expected. Fundamentally, IMC agency writers’ interests lay with the agency and occupational community, just as each client’s interests lay

with its own corporate mission and goals. Unlike the ongoing nature of occupational and organizational communities, agency-client relationships, seemingly no matter how strong, are not communities built to endure but interorganizational bonds with community-like characteristics that can end quickly and permanently.

During my observation period at PSA, two clients unexpectedly ended their relationships with the agency. Both relationships had been long-term, established, and successful until the end. While only the former clients know the exact reasons why, these agency-client relationships ended for reasons seemingly unrelated to the intercommunity bonds the agency writers felt or to the quality of the work the agency writers had done for the clients. In the first case, Ellis and PSA lost client AnimalScience ostensibly because the company wanted an agency closer to their headquarters in another state. In the second case, Joe and Steve lost client Community Arts to “hungrier” agencies during a government-required rebidding process despite past campaign work that had helped the client grow exponentially since the beginning of the relationship. In both cases, the writers were frustrated, disappointed, but philosophical.

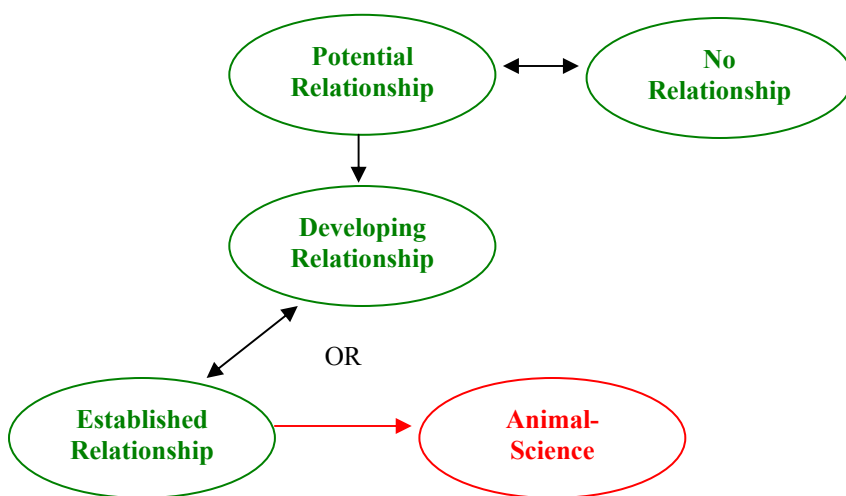
These cases illustrate a primary reason why I have hesitated throughout this study to call the agency-client bond a rhetorical community, though rhetorical and community-like characteristics can be identified. The relationships remind us of the unique and fragile positioning of agency writers in relation to their clients, their work, and their general livelihood as professionals. Agency writers depend on making and strengthening bonds with their clients so that they can develop a foundation for using the IMC community occupational genres rhetorically for their clients’ rhetorical and economic goals. But that intercommunity bond is superficial at best in the face of economic and corporate realities. A client’s corporate

goals and economic situation easily can and will trump an intercommunity relationship established with an agency. The agency and its writers are not members of the client's immediate corporate community and are, therefore, expendable. And without clients for which to write, IMC agency professionals would be hard pressed to fulfill the goals and use the genres of their occupational community.

In this chapter, I first examine the cases of AnimalScience and Community Arts to show how clients' loyalty can be swayed despite strong relational bonds or the quality of rhetorical genre use. In each case I introduce the client, evaluate the relationship briefly in terms of the four characteristics of community I have identified throughout this study, and explore the agency termination and its effects on the writers. Finally, I discuss how the existence of the four community characteristics does not constitute a guarantee for rhetorical community because of the nature of the IMC agency business. This chapter illustrates that although building and maintaining community-like bonds with clients allows agency writers to use genres rhetorically through both their occupational community and intercommunity client relationship, the corporate community of the client often confounds the agency-client relationship and eliminates that rhetorical bond.

### **THE LOSS OF ANIMALSCIENCE**

As noted in the introduction to this chapter, agency-client bonds are not as strong as they might appear, even in the case of long-term mature relationships. In this section, I explore the first of two agency-client relationships that ended unceremoniously during my observation period at PSA: AnimalScience, an animal health company (see Figure 6.1).



**Figure 6.1: AnimalScience Relationship.** Green indicates successfully completed relationship stages; red indicates termination.

When the relationship ended, AnimalScience had been a steady PSA client for over five years. The client is located in a large city several hundred miles away from the

offices of PSA, but since face-to-face client contact can be a luxury in these relationships, the client seemed satisfied with the two to three trips PSA staffers made to its headquarters during important planning stages of the year. Ellis had served as the creative lead for the client since he joined the agency, handling team and idea management for all projects on the account. When describing the relationship initially to me, Ellis noted

they do most of their collateral work in house, so what we do is mostly event planning and magazine advertising. But they let us do some non-traditional advertising inserts and do things in a variety of different ways. We always try to bring them something that's a little bit different because they always appreciate it.

Ellis's statement helps to shed some light on the characteristics of community present in PSA's relationship with AnimalScience. Over the course of their five year relationship, a strong working trust developed between the two companies that allowed the agency the creative freedom to try new genre approaches in ways that AnimalScience valued. Much of this trust was derived from the process of working together and developing community characteristics. For example, Ellis implies that AnimalScience's openness to new types of advertising within the traditional print genres stemmed from trust and shared purpose. Over

the course of developing previous campaign materials and collaborating on yearly strategic plans, both organizations had come to trust that they shared a common purpose. They also developed a common understanding that PSA was knowledgeable enough about AnimalScience to add creative dimensions to project work within the boundaries of acceptable responses to the recurring situations the advertising addressed. The two organizations were able to work well together and understand each other, as is demonstrated clearly in the final major project PSA completed for AnimalScience before the contract termination.

### **Detailing the Last PSA-AnimalScience Project**

Due in part to AnimalScience's openness to creative ideas, PSA had a history of excellent work for AnimalScience, a history they added to during the first part of my observation period with an event planning and promotion project. AnimalScience tapped Ellis and the PSA team to create the theme, promotional materials, and several activities for a large regional event that winter. The team developed a theme based around the location's heritage and rock concert posters. As part of the project, PSA developed and delivered numerous posters, a scavenger hunt complete with clues and prizes, and a video introduction for the meeting proceedings.

During one session with Ellis, I observed as he worked single-mindedly on the AnimalScience project, negotiating copy edits to the video introduction voiceover script with the client and designing and rewriting clues for the scavenger hunt that would be "fun and challenging but not too linear" for the audience. During these activities, Ellis demonstrated a keen knowledge of the purpose and audience the video and scavenger hunt address, at one



point noting he was negotiating the voiceover content because he wanted “to be sure to highlight only the stats and points the audience will find most compelling.”

When discussing this work in our next interview, Ellis knowledgeably discussed the company and its situation, even using the pronoun “we” when discussing the voiceover copy decisions he made to achieve the client’s messaging goals:

We don’t show all the products in the pipeline, just the ones we have. And we allude to the fact that more products are coming, which made for a better pacing and summary because it didn’t drain the energy out of the real high points.

Ellis spoke about AnimalScience as Joe often spoke about Nature Financial, as if he were acquainted intimately with the organization and comfortable enough with the relationship to use first person inclusive pronouns when discussing it.

Ellis was proud of the regional event project because he felt that it allowed him to showcase his artistic sensibility and his love for music in a way that the client appreciated:

I felt good about that project in that the initial idea came up while we were still in a meeting, when I said to the client, “well, what if we do those music-style posters you see outside?” It was nice to see something that was just an idea that I shared with the client that they liked. And our art director understood the idea, just nailed exactly what I was talking about and ran with it. It turned out better than I could have ever imagined.

He called the project “really interesting” because they were able to do “some funky stuff” for the client. AnimalScience praised the event materials, with the project contact telling Ellis directly that he thought “it was the best work [the agency] had ever done for the company.”

This praise made accepting the fact that AnimalScience abruptly terminated the PSA contract immediately after completing the materials a difficult pill for Ellis and PSA to swallow.

### **Terminating the Agency-Client Relationship Unexpectedly**

Shortly after the event materials were printed and after an on-site meeting to discuss the 2006 strategic planning and campaigns, AnimalScience ended their contract with PSA.

According to Ellis, the agency was told officially by their primary contact that AnimalScience wanted an agency geographically closer to its headquarters. Ellis noted that PSA was shocked, as was Ellis's contact for the regional event project. Informally Ellis was told that upper management might have been approached by a local agency that pitched an ad or a piece "that just blew them away and they had to have" despite the long and successful history with PSA. On the way that AnimalScience handled the break, Ellis said

They just called up and cut ties rather than asking if we could revise or try something different for them. It's frustrating, but it's the nature of this business. You work hard to give the client what they want and work within their boundaries. And then someone comes along with one piece that's probably unbound by the science of it (budget, deadlines, etc.), and they take the business. I'll be really curious to see if the ad the new agency came up with was that good.

Ellis was philosophical about the loss, as he is about the nature of his business throughout the study, but the loss was felt and later spurred him to greater focus on several requests-for-proposal responses.

At the beginning of my observation at PSA, the agency had what it considered a strong relationship with AnimalScience, but that relationship ended unexpectedly after the agency had done some of its best work ever for the client. Ellis's early comments about the client and the regional event project demonstrate an insightful rhetorical awareness of the client, the relationship, and the communication activities they shared. The unexpected loss of the client naturally frustrated Ellis and PSA because they had no choice in the matter nor were they aware if they were to blame for their own dismissal. While they had achieved an established intercommunity relationship that allowed Ellis to contribute create and rhetorically appropriate work for the client, the bond between agency and client was outweighed by the client's corporate imperative, illustrating why agency-client relationships

only mimic communities, as I will discuss further in the case of the second lost client, Community Arts.

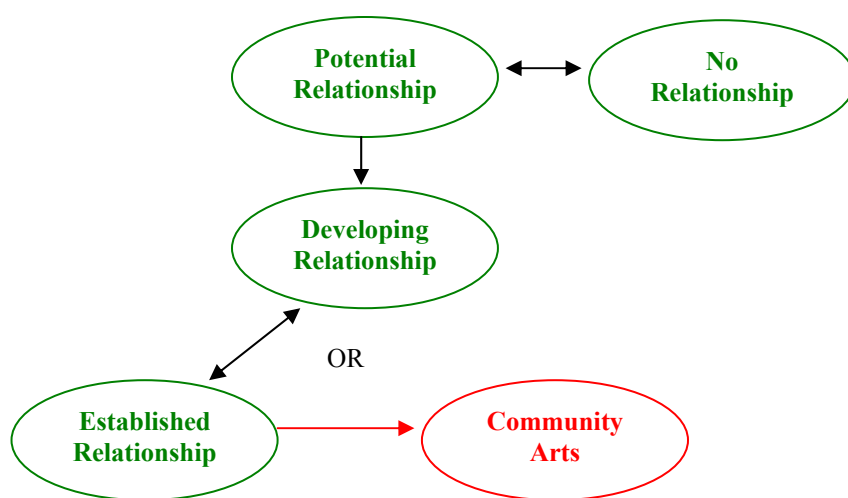
### THE LOSS OF COMMUNITY ARTS

During the last month of my observation period, PSA lost a second, smaller client, Community Arts, a state-funded arts organization. Since PSA had been begun working with Community Arts six years ago, the agency had done extremely beneficial work that increased public awareness and financial support for the client. But just as AnimalScience had been led away from the agency by the allure of new ideas from another agency, so was Community Arts, showing again the lack of expected loyalty that should be necessary to sustain rhetorical communities or relationships (see Figure 6.2 below).

Community Arts is a state-funded quasi-governmental organization dedicated to providing arts awareness and programming in the local communities. The organization relies

heavily on state funding and donations to support its mission and arts awareness initiatives in the community.

PSA began its relationship with Community Arts



**Figure 6.2: MSA-Community Arts Relationship.** Green indicates successfully completed relationship stages; red indicates termination.

with a small Web project and had worked closely with the organization after that doing what Steve called a combination of contracted and *pro bono* work. The agency's work, led primarily by Joe as the creative team lead and head writer on the account, was extremely successful, earning Community Arts and PSA several regional and national campaign awards and a marked improvement in the community recognition of the client.

Joe described the relationship as one based on shared passion for the organization's mission and on collaboration. As a member of the local community as well as an IMC professional, Joe believed in Community Arts' mission, which allowed him to develop over time the necessary trust, shared purpose, and shared repository of knowledge to produce rhetorically strong work for the client. The client was also very open to collaboration with Joe and PSA which allowed them to discuss recurring situations requiring communicative response from which Joe could develop appropriate and creative responses. Yet this strong, long-term relationship built on collaboration and mutual passion for the mission was not enough for PSA to retain the contract with Community Arts when it came time to make a bid for the next major promotional campaign.

### **Engaging the Rebidding Process with an Existing Client**

During my study, Joe, Steve, and the agency's president responded to a request for proposals (RFP) from Community Arts as part of the client's mandatory contract rebidding process. As an organization dependant on government funding, Community Arts was required by law to rebid any new major contracted work, including marketing communication campaigns. The RFP was sent to all agencies around the state that then had the opportunity to submit proposals to the organization. PSA had not gone through this

process originally since their relationship with Community Arts began with the relatively small Web project.

Joe and Steve explained that most RFPs such as the one Community Arts sent out involved a multi-phase process. I observed Joe, Steve, and the agency president as they divided up sections of the Phase I proposal which entailed creating possible campaign themes and tag lines for the organization without visuals. Each PSA team member felt uncomfortable with the bidding process because it was counter to the collaborative way they worked with the client over the last six years. Joe also expressed anxiety that the success of the bid depended entirely on “the line,” the creative tag line the agency came up with, so the team decided it was appropriate to include several possible themed tag lines with an explanation of how the tag line would play out in marketing activities and was relevant to the organization and its target audiences.

Joe, Steve, and the president independently worked on sections of the Phase I proposal for Community Arts, and Joe wrote the possible themes for the creative section based on their brainstorming session. Joe’s creative section consisted of four+ single-spaced pages containing six possible campaign themes, each with a two to three paragraph descriptive explanation of the theme and its appropriateness to the community and the client’s goals. Before discussing the themes in the proposal, though, Joe crafted a rhetorically persuasive introduction to the section which carefully alluded to the long-term agency-client relationship, expressed the fact that the proposal process did not lend itself to their usual working collaboration with the client, and included a list of several discarded ideas with text explaining how PSA knew the client would not appreciate these options. Joe’s rhetorical introduction was carefully developed to remind the client of the history between the two

organizations, their strong working relationship, and the knowledge of the client PSA had developed over time.

Joe crafted his creative section this way to intentionally position the agency as more knowledgeable than all other applicants because the team was not sure how their incumbent status would affect client consideration. In terms of their strategic positioning among the other bidders, Joe said he saw some advantage in being the incumbent with the client during the bidding process, but the status was also a hindrance:

We have a good relationship with the client and have done nationally recognized campaigns for them. But outsiders have advantages too because they can be free to create, unencumbered by restrictions that we have faced in the day-to-day limits of what the client wants and pays for. Often the best work an agency does is for the RFP, but then the creative wheels fall off from there in the reality of the relationship and its budget and time constraints.

Joe, as a senior creative team member and long-time agency writer, understood of the nature of his business and the self-interest each organization in the process must display. Even though he was somewhat confident in the strong relationship they had developed with the client over the years, he was also highly aware that relationships between organizations are not bound by the same sense of loyalty that human relationships are, no matter how strong the bond.

### **Losing the Client in Phase I**

Joe's suspicions over the strength of the agency-client relationship were confirmed when the agency was not selected to participate in Phase II of the Community Arts bidding process. The team agreed that they had been "outhustled by the hungrier agencies" that had provided full textual and visual mockups of concepts rather than the text-only work PSA provided and that the RFP requested. The agency president learned from the Community Arts contact that the other agencies simply presented more complete work that they could not

ignore. Joe's frustration in this situation echoed Ellis's frustration at the loss of

AnimalScience:

It is a huge disappointment for us. In the long run I know we invested more money into that client than what we returned, but overall we gave them too much credit. It's a business where there are no loyalties; all they talked about was all the awards and where we've taken them as their agency over the last few years. We thought that history would get us to the second round where we would go all out bringing the concepts to life. To have that history totally not considered is beyond frustrating.

Steve later convinced the staff that the loss of Community Arts was not as detrimental to the agency as it first seemed, although the loss still stung everyone. Steve reminded everyone that the combination of small contracted work and *pro bono* work the agency had done for Community Arts essentially cost them more in labor than was ever returned in revenue despite the awards earned for the work. By distancing themselves from the placing of blame for the loss of the client, the writers moved on but redoubled their creative efforts on every RFP proposal I observed for the rest of the observation period so as not to be "outhustled" again.

As with the loss of AnimalScience, the writers found ways to rationalize and deal with the loss of the client and to move on with their work, although the frustration remained. Joe and the agency president specifically felt that they had been betrayed by this client, even though they knew the highly competitive nature of their field. Even the community-like bond that Joe had developed over six years with the client was not enough to overcome the extra work completed by the other agencies bidding for the contract. The IMC agency business is very competitive, and an agency's bottom line does depend on the rhetorical and creative strategies employed by the writers and designers to satisfy clients, thus making loyalties suspect and community a highly temporary concept between organizations.

### INTERCOMMUNITY RELATIONSHIPS VS. COMMUNITY

Both the cases of AnimalScience and of Community Arts illustrate the inherent nature of the relationships between an IMC agency and its client organizations and the fact that the client's self-directed corporate imperative to save and make money can overpower intercommunity bonds built with an agency. In these cases, clients broke ties with PSA for reasons the agency had no control over or no knowledge of, making a strong case that these bonds are relational not communal: individual relationships can end quickly and for a variety of one- or two-sided reasons, whereas communities usually dissolve or morph more slowly over time. Even relationships imbued with strong community-like characteristics cannot survive if one organizational community's imperative to strengthen itself is stronger than the relational bond between organizations, as it usually is.

The community-like bonds of relationships that I discussed throughout this study are crucial to agency writers' ability to write rhetorically for their clients, but these bonds are not as solid as they might seem. As the agency-client relationships discussed in Chapters 4 and 5 demonstrate, bonds between the organizations can form that allow the IMC occupational genres to be used rhetorically for the benefit of the relationship and its goals. Paul and Ellis negotiated a developing relationship to share an initial sense of purpose, recurring situation, and appropriate response with Second Specialty, which allowed them to use genre strategies from their IMC occupational community repertoire for the goals of the intercommunity relationship. Similarly, Joe and George's intimate knowledge of Nature Financial's business and industry allowed them to become trusted external extensions of the client's organization and to use their genre repertoires seamlessly and rhetorically for the joint agency-client goals.



These examples of developing and established agency-client relationships present an accurate but incomplete picture of the agency-client cycle. Despite the presence of the four characteristics of community in relationships between an agency and a client organization, most relationships eventually follow the same life cycle as everything else in nature and society. Most agency-client relationships will eventually flounder, fail, or die. The cases of AnimalScience and Community Arts demonstrate how easily and superfluously agency-client relationships can be terminated. Both of these relationships were long-term, successful relationships in which the agency writers felt confident and in which excellent joint work was produced. But both relationships ended regardless of these factors. Intercommunity bonds had been formed with these clients, and genres had been used rhetorically rather than simply economically to accomplish the goals of these relationships—but as noted in Chapter 1, relationships and even community are often temporary, stable-for-now achievements rather than consistent, self-evident entities.

All agency relationships go through stages of development, commitment, re-evaluation, and eventually termination, no matter how strong. Even extremely long-term relationships like those created in the major advertising relationships depend on a constant infusion of new creative blood into the agency to stay alive. Even the extremely close relationship between PSA and Nature Financial was tested when the new vice president of marketing decided to rebid the contract. Joe and PSA retained the contract but only after an enormous amount of effort put forth to break the barrier that the new VP had mentally erected because of his preference for another agency he knew better.

Every business partnership between organizations rests on the tacit assumption that the relationship will continue only as long as it benefits both parties; when one party is

dissatisfied or tempted away, the relationship ends. The members of organizational communities make decisions based on what actions will sustain the profitability of the community rather than any intercommunity relationships. On the other hand, members of an occupational community whose mission is to serve other organizations, such as the IMC occupational community, depend on building strong, long-term relationships with clients to support their own community's goals. And since the clients have most of the power in the agency-client relationship, the client's corporate community imperative, as demonstrated by AnimalScience and Community Arts, trumps the IMC agency's occupational community imperative to maintain relationships.

#### **CODA: STRENGTH OF BONDS AFTER RELATIONSHIP TERMINATION**

While the previous discussion shows that the very nature of the IMC agency business in many ways prevents fully bonded communities between agency and client organizations, sometimes threads of connection do outlast the original relationships. The agency-client relationship is tended and strengthened by one-on-one contact by the writer and client representative. Several contacts at both organizations may be involved, and personal bonds form the heart of that relationship. Good professional relationships between individuals often remain long after the initial agency-client relationship ends, creating networks the agency and writers could draw on in the future if cultivated properly.

During my observation period, PSA was cultivating relationships with potential new clients based on maintained relationships with past client contacts. Because client contacts are only representatives of the client that severed the relationship, the professional bonds between contact and writer can be drawn on if the contact moves to another organization and

favorably remembers the work of the agency and the people. In this way, a sense of mutual respect or of network, rather than community, can remain even after the agency-client relationship conclusively ends.

The case studies presented in the previous three chapters illustrate the unique positioning of integrated marketing communication agency writers and introduce several different ways to think about community and rhetorical genre use. In the following final chapter, I return to the initial research questions this study addressed to discuss the place of community in the rhetorical genre use of IMC agency writers and communities in general and to suggest possible areas of further study in this area.

## CHAPTER 7 CONCLUSION: RHETORICAL GENRE, COMMUNITY, AND THE WORK OF AGENCY WRITERS

Genre and community are difficult-to-define, often nebulous concepts used extensively in professional communication research. When I began my exploratory, qualitative study with five professional writers at integrated marketing communication (IMC) agency PSA, I was interested in how these concepts would assert themselves in this complex writing environment, where fragmented and varied cultures, communities, and industries, as well as multiple audiences and gatekeepers, are all often at cross-purposes. Based on existing work in genre and community theory, agency writers in these environments seem to be weak candidates to use genres rhetorically because they appear instead to use genres for economic gain, selling their writing abilities and formula-based “genred” documents to clients.

However, my research shows that, at least at PSA, agency writers can use genres rhetorically for their clients like other writers studied in the literature. Agency writers may not belong to the client organizational communities for which they write, but they are embedded in the IMC community through personal commitment and/or their agency community, which provides necessary supporting socialization, culture, norms, values, and history from which the writers draw. My research supports the idea that PSA agency professionals write rhetorically for clients by calling on occupational/agency community membership rather than membership in the client organizational community. However, the occupational community suffices only when certain shared characteristics also exist between writer and client:

- *A shared purpose* of accomplishing the work of an intercommunity group.
- *A shared repository of knowledge* of accepted norms, culture, history, and needs.

- *A shared sense of recurring situations* that require specific types of communicative responses.
- *A shared goal of appropriate response to recurring situations* drawing on shared purpose and knowledge to act socially.

Using these four characteristics to evaluate the relationships formed by the PSA writers sheds light on the narrow organizational focus that genre and community theories have taken in professional communication scholarship. This evaluation also encourages further research beyond the usual boundaries of organizational community and genre use.

In this concluding chapter, I summarize key findings of this dissertation and their implications for theory and research. I identified three research questions for this study in Chapter 1:

- To what extent might writing tasks undertaken by agency writers for the social purposes of other organizations still constitute rhetorical genre in the sense of social action?
- How do professional agency writers come to understand their clients in order to successfully use genres for multiple clients and their audiences?
- What community membership is required for successful rhetorical genre use by agency writers for their clients, and how do agency writers negotiate these issues?

Guided by these questions, three important conclusions regarding the rhetorical genre use of IMC agency writers emerged:

1. Agency writers at PSA can and do use genres rhetorically by acting socially through the occupational and organizational communities.

2. PSA agency writers can use occupational genres for rhetorical purposes in relationships with clients because they develop community-like bonds through shared purposes, knowledge, sense of situation, and sense of appropriate response.
3. The agency-client relationship is *not* a full-fledged interorganizational community because corporate self-interest prevents complete loyalty in the relationship.

First, I discuss each of these three key conclusion, using theory and case study data presented in the dissertation. Next I summarize the implications of my study for genre and community theory in professional communication research. Finally I suggest avenues for further study with agency writers, genre, and occupational communities.

#### **AGENCY WRITERS USE GENRES RHETORICALLY**

Current genre theory assumes that to undertake the discursive “work” of a community, one must be a socialized community member with an understanding of common recurring situations and community-sanctioned responses to those situations (Miller, 1984, 1994). My conclusions suggest that, at PSA, agency writers use genres rhetorically for the clients they serve because in doing so they fulfill the goals of their integrated marketing communication occupational community and the PSA organizational community.

Through their education, experience, and/or organizational membership in the PSA community, the agency writers are members of a larger occupational community of IMC professionals, and, when acting through this community membership, writers can use genres for rhetorical purposes. IMC community members share the goal of providing IMC expertise to organizations, and IMC professional writers specifically strive to create superior communication vehicles and effective message strategies to reach target audiences.

Essentially, the discursive work of IMC occupational community members is to use their expertise and genres to achieve other communities' rhetorical goals, whether the IMC professionals work internally as employees or externally as agency partners.

The case studies presented in this dissertation show the PSA agency writers drawing on their IMC occupational community genres as well as their knowledge of the client's organizational community to craft effective, rhetorical documents. For example, in the early stages of the Second Specialty relationship discussed in Chapter 4, Paul, Ellis, and Steve drew on their understanding of the rhetorical situations facing the client, their knowledge of effective genres given the client's market position, and their own assessment of the client's needs and goals to craft a valuable strategic plan. Based on this mutually approved plan, the writers used the IMC genres of the print and Web advertisement, press release, and email newsletter, among others, to help Second Specialty achieve its goals. To use the genres rhetorically, the writers adapted their community knowledge of IMC genres and practical agency experience, combined with information about the clients and their goals.

The PSA agency writers used the genres of their IMC occupational community to act socially within their occupational and organizational communities and for their clients. My study suggests that genres are attached to communities for rhetorical value as genre theory asserts. Yet the study also implies that the communities to which the genres are bound and can be used for rhetorically deserve more investigation. Considering this question of community, groups, and boundaries of genre use led to my second conclusion.

### **INTERCOMMUNITY RELATIONSHIPS PROVIDE CONTEXT FOR RHETORICAL GENRE USE**

Many scholars using genre theory as a lens in professional communication research have done so with a narrow focus on individuals in single organizations. As Amy Devitt (2004) reminds us, groups of people who spend much time working toward common goals can be considered communities, but individuals belong to many communities for which they “shift identity and motives” as necessary to accomplish goals (p. 42). As members of the IMC occupational community through education or agency work, the PSA writers form relationships with their clients in order to use their IMC genres effectively and, therefore, to achieve the rhetorical goals of their occupational community.

In the cases of both Second Specialty and Nature Financial, the agency writers enacted the rhetorical goals of their occupational community and negotiated goals for the agency-client relationship. As noted in the Second Specialty case study, writers Paul and Ellis created documents in a variety of IMC genres for their first campaign with the client, building on the mutually agreed-upon strategic plan as a relationship foundation. While developing the documents, writers and client engaged in many textual negotiations until both sides felt the rhetorical imperatives of their individual communities were achieved within the context of their intercommunity relationship. Similarly, Joe’s extensive knowledge and personal identification with Nature Financial allowed him to use his occupational genre expertise to craft numerous documents with limited client input and negotiation. This relationship was so strong that genre use served the rhetorical functions of the two individual communities and the intercommunity relationship implicitly.

While the agency-client relationships were not fully formed communities, they each exhibited the necessary four characteristics of community to allow the IMC writers to write



rhetorically for the client relationship. The agency writers thought about the clients' businesses, audiences, industries, cultures, and conventions while collecting additional information from clients to develop a shared sense of purpose and base of knowledge. This learning process does not imply socialization into the client organization but rather that learning about the clients allows the writers to use their occupational genres effectively for the shared goals of the relationship. They also used their IMC occupational community knowledge and agency experience with other clients to assess recurring situations and appropriate responses for each client. With this community-like knowledge to build on, IMC agency writers at PSA used occupational genres for rhetorical purposes in their intercommunity relationships with clients. But as I discuss in the next section, intercommunity relationship between agency and client are not and never will be full communities.

#### **AGENCY-CLIENT INTERCOMMUNITY RELATIONSHIPS ARE NOT COMMUNITIES**

In Chapter 2, I presented a working definition of community that I have attempted to conform to throughout this dissertation. In my definition, community is a group of like-minded individuals who structure themselves around a shared subset of values, goals, practices, and norms which can be transferred to new members as needed and whose primary purpose is to work toward a common goal. Based on this definition, I have hesitated to call agency-client relationships communities, opting instead for "intercommunity relationships," which implies communities working together for a common purpose rather than two communities forming a new hybrid community. Strong agency-client relationships share a common purpose and goal, but that goal always is subservient to the goals of the component

communities in the relationship. The agency-client relationship is *not* a full-fledged community because corporate self-interest prevents complete loyalty.

When working with clients, the agency writers' goal is to fulfill the rhetorical imperative of their occupational and organizational communities by building and sustaining client relationships. To do so, writers strive to form joint goals with their clients through building intercommunity relationships while remaining loyal to their occupational community. As George put it,

I'm a PR guy. That's who I am. I have a high level of loyalty to the agency because they showed loyalty to me and helped me build the organization. My level of client loyalty is not really high. You can build relationships with client contacts and really like them and do good work with them, but they might move on and that loyalty is often gone. It's the nature of the business.

George makes the important point that agency-client relationships are people relationships. Small teams, rather than the entire agency, work with clients, and one or two people usually manage all client contact. Personal relationships drive organizational relationships, but those relationships can end whenever the client or agency organization decides.

The cases of AnimalScience and Community Arts demonstrate clearly that agency-client relationships are not communities. AnimalScience terminated its relationship with Ellis and PSA at a time when Ellis believed that the team did its strongest work for the client. Similarly, Community Arts eliminated PSA during its campaign rebidding process despite a very successful history because other agencies went beyond the call of the RFP. Both of these terminated relationships were considered strong, established working relationships by the agency. But in both cases, the client organizations changed agencies regardless. Even in the strongest relationship discussed in this dissertation, Joe and Nature Financial, very nearly ended when a new marketing director doubted PSA's value. Organizational self-interest trumped the personal and successful relationships with the agency.

Thus, if communities are groups of people who share primary goals, agency-client relationships are not communities, no matter how strong the relationships are. Strong intercommunity relationships can mimic community, especially when the four characteristics of community are well developed. But above all, the people in the relationships will always have stronger commitments to their own organizations and communities. While keeping clients in the best interest of the agency community to allow member writers to do their occupational work, client organizations will always be strongly compelled to act in the best interests of the organization not the relationship. Thus, agency-client relationships can never be full communities.

In summary, the IMC agency writers at PSA have shown themselves to be knowledgeable, rhetorically aware community members who strive to use the genres of their occupational community through the agency for their clients. Because the occupational and organizational communities provide necessary grounding for genres, the PSA writers can use genres rhetorically through their client relationships to fulfill the goals of the IMC community. To make up for the lack of full community, the writers strive to form intercommunity relationships based on the four community-like characteristics to use their genres most effectively for clients. But agency-client relationship can never be full communities because the two organizations never fully merge to share one primary goal. This dynamic mirrors one to which academics and students can relate, as discussed below.

#### **ACADEMIA AS OCCUPATIONAL COMMUNITY**

In many ways the placement of IMC agency writers is similar to the academic community from both the faculty and student perspectives. In her work on academic

discourse communities, Bizzell (1992) implies that academics tend to identify with individual disciplines' discourse communities before their universities, just as IMC writers sometimes identify with the occupational community before the agency community. This positioning allows academics to converse and share goals with other academics and practitioners in their disciplines despite the organizational walls between them. Similarly agency writers accomplish their work of communicating for organizations as agency employees, in-house employees, or freelancers because they are loyal to the IMC occupational community rather than the organization or client. Both academics and IMC writers can move easily between organizations because their identities are defined by the disciplinary or occupational community not so much by one organization.

Furthermore, IMC agency writers are very much like university students in their rhetorical positioning. Dias and colleagues (1999) assert that students cannot learn the genres of a workplace community while embedded in the university setting. Yet students, like agency writers, function within a community in which a major goal is to learn to write effectively in the "cultures" of other communities, academic disciplines for students and client organizations for agency writers. Additionally, while taking classes in their majors, many students are socialized slowly into their occupational communities and learn the rhetorical genre foundations they will hone when they enter a specific workplace, as agency writers hone their IMC genre knowledge through their work with multiple clients. The rhetorical positioning of both academics and university students lends weight to the claim that when a community allows members to use its genres to fulfill the goals of other communities, members can write rhetorically and effectively, even though this claim has not been acknowledged in the past.

In the next section, I explore how the work of agency writers and the idea of occupational community can inform current genre theory, especially in connection with community.

### **IMPLICATIONS FOR GENRE THEORY**

My research has important implications for genre theory in professional communication studies, especially regarding community perceptions. As stated previously, I agree that communities and genres are closely linked and that community socialization is necessary to understand the recurring situations and appropriate means of response. Yet I suggest that genre theorists include community concepts beyond the organization, reinterpret the socialization function, and allow that genres can be used by community members for situations outside the original community. In this section, I summarize these challenges to genre and community theory presented in this dissertation.

While organizations do make excellent sites for workplace writing research, organizations are not the only context in which genre as social action might be studied. In this dissertation, I introduced the concept of occupational community and identified the IMC occupational community as a possible source of genre knowledge and professional identities for the PSA writers rather than just PSA itself. Using IMC genres to serve the needs of client organizations falls within the rhetorical province of the IMC occupational community, thereby allowing PSA writers to write rhetorically within the sphere of their occupational community where organization-based genre theory would not. Occupational communities have not been examined expressly in genre research thus far.

Secondly, if agency writers are members of the IMC occupational community, they can rely on both occupational and organizational community for socialization and rhetorical imperative. The agency writers learn about the goals, purposes, culture, and tools of the occupational community through their formal education and/or less formal hand-on agency training, as evidenced by the different paths the PSA writers took to arrive at the agency. Agency writers constantly add to this occupational education as they work with different clients and other members of the occupational community through the agency organizational community, making socialization a continuous and hands-on experience. This idea of layered community membership and socialization expands our perception of the conditions under which genres become typified responses and how newcomers learn to use genres effectively which should be considered in future theory and research.

Additionally, if occupational communities are a source of genres, then these communities allow people to change jobs and organizations with less trouble than novices because they are already familiar with the occupational genres and simply must learn to apply them in a new culture. The writers' ability to transfer occupational knowledge more easily than organizational knowledge also helps to explain how agency writers can use genres effectively for the numerous clients they may write for simultaneously. Knowledge transfer is an important issue that genre studies across workplaces should address, and occupational community presents one means to discuss transfer methods.

Finally, because a good deal of their knowledge and skill is developed through their occupational community, I posit that genres may be used rhetorically by a community member for situations outside the immediate community when participants in the situation can come to share a goal, some level of knowledge, a sense of rhetorical situations and

appropriate response to the situations. In Chapters 4 and 5, the agency writers and client negotiated useful cross-community goals and boundaries that allowed them to share, for a time, a rhetorical purpose for genre use across communities. By negotiating community-like bonds within the agency-client intercommunity relationship, agency writers can draw on their occupational genres and expertise to write rhetorically for clients without full membership in the client organization as current genre seems to require.

The above discussion points to several ways that the results of my study both reinforce and challenge aspects of existing genre and community theory. Genre theory in professional communication may need to be adjusted to be more inclusive of communities that supercede the organization, like the IMC occupational community, yet still produce and regulate genres used rhetorically in various types of organizations. Theory should also recognize that community in broader terms includes the intersections of overlapping communities, such as occupational and organizational communities. Under appropriate conditions, community members can develop relationships with members of other communities that provide a temporary, negotiated context for rhetorical genre actions. To be inclusive, then, genre theory must broaden its perspectives to accommodate interorganizational and intercommunity groups relevant to professional communication.

### **SUGGESTIONS FOR FURTHER RESEARCH**

The work of the PSA writers with and for their clients points to different conceptions of community and community-like relationships in which genres can be used rhetorically. In order to validate and extend the case study research findings presented here to other areas of professional communication, I suggested the following potential avenues of study.

First, studies of other professional agency writers should be conducted to complement and test the work compiled in this study. Studies with other writers in agencies like PSA can show if the PSA writers are unique in their community membership and genre use or if the concept of IMC occupational community membership extends beyond this particular agency. IMC agencies are common in all major cities, and each has unique industry and service interests that will yield valuable comparative data. Studying these agencies would provide additional information that can be used to develop more inclusive genre and community theories in professional communication and would provide productive research sites and professional subjects.

Secondly, professional writers work in a variety of other agency settings including single-service agencies and what might be termed fulfillment agencies. Single-service agencies are the more familiar advertising, marketing, and public relations agencies that usually provide one IMC service to clients. Fulfillment agencies essentially write and produce collateral documents for clients that use other agencies or internal groups to do the more high-level brand and campaign strategy development. Studying the genre use and community affiliation of writers in these different types of agencies would provide a better understanding of the agency writer position in general and further explore whether genres can be used rhetorically by writers in a variety of agency environments.

Next, since I identified occupational community in this dissertation as a new means for thinking about and studying professional writers, I recommend studies that examine professional writers as occupational community members working in various situations. IMC agency writers, technical writers, grant writers, and freelance writers, for example, can all be members of an occupational community that differs from the organizational community in



which they write. Survey and interview studies with these writers might identify key characteristics of the occupational communities which can then be examined further with qualitative studies in different organizational settings to open community theory more broadly.

Finally, if occupational community is accepted as a legitimate perspective for studying professional writers, researchers can conduct valuable longitudinal studies with professional writers. Longitudinal studies with career writers can provide insight into how occupational community membership helps or hinders members as they change positions, change industries or organization types, and apply their occupational knowledge to a variety of situations during their careers. These studies could illuminate socialization and knowledge transfer issues, including genre knowledge, in terms of occupational and organizational communities.

By continuing the research started in this dissertation, researchers in professional communication can examine issues of genre and community in a variety of different perspectives and industries. Professional writers work diligently in many industries and workplace situations that have rarely been acknowledged by professional communication scholarship. Expanding our purview to include professionals such as IMC agency writers helps to fill in gaps in rhetorical genre theory and community theory and allows our research to be more comprehensive.

## CONCLUSION

Ellis, Paul, Steve, Joe, and George are dedicated professional writers with a wealth of occupational and organizational community knowledge who wield the genres of their

communities for the shared purposes of agency-client relationships. Their genre use is rhetorical because it is based in the goals of their occupational community. But their work is also rhetorical because they (attempt to) share with their clients a sense of purpose, repository of knowledge, sense of recurring situation, and sense of appropriate response to those situations.

In their cases, community is a given as they exist in their chosen occupational community and the PSA organizational community; however, a sense of community in this case is also a process, an incomplete and temporary achievement, as evidenced by the intercommunity client relationships they build. By studying professional writers like those at the IMC agency PSA, we evolve our understanding of rhetorical genre use within and between different communities, which can only strengthen our understanding of these difficult-to-define but crucial theoretical constructs.

**APPENDIX A: PROJECT PROSPECTING LETTER AND PROPOSAL**

27 June 2005

Agency Address

**RE: Proposed Research Studying Marketing and Public Relations Agency Writers**

Writers in marketing and public relations agencies face distinctive professional challenges as they write for client after client, each with its own set of demands and audiences—but did you know these challenges that have been largely ignored by researchers and educators? Sharing the challenges and stories of agency writers like your own could open new doors for the education of professional writers as well as bring much deserved attention to the unique field of marketing communications. My proposed dissertation research would attempt to do just this, and I would like to discuss the possibility of conducting part of my research with XXX.

As a former marketing agency writer/project manager and current PhD student in rhetoric and professional communication at Iowa State University, I am fascinated by the audience and client management skills that writers in marketing and public relations agencies like your firm must develop and hone. Very few other professional writers deal with the challenges of maintaining the voice of each client for each client's audiences while simultaneously building an identity as a professional writer and member of the agency work culture. As you know, learning to balance all of the different audiences and personas is paramount for success as an agency writer but can also be a difficult process, one I'd like to explore with your agency writers.

The type of research project I envision would have minimal impact on your day-to-day operations and would completely protect the identity of your agency and clients. Additionally, in return for access to interested writers, I would reciprocate your generosity by providing a targeted report of my findings for your use, quarterly workshops for writers, and/or several hours of writing services per week. To further explain this study, I have attached a more comprehensive research proposal detailing the research questions and methods of my proposed study as well as a resume detailing my academic and workplace credentials.

This new and uncharted research area in professional communication could introduce many students and educators to the field of marketing communications. I will call you in two weeks to ensure you have received my proposal and to explore the possibility of meeting to discuss this study further. If you have any questions or comments before that time, feel free to call or email me using the contact information above.

Thank you sincerely for your time, and I look forward to speaking with you in the near future.

Best wishes,

Rebecca J. Pope-Ruark  
Enc.

## **Proposal to Conduct Professional Communication Dissertation Research Study with Agency Writers**

27 June 2005

The purpose of this proposal is to request permission to conduct my Ph.D. dissertation research at XXX. I want to study the ways in which marketing and public relations agency writers learn to write for a variety of clients and audiences. As a former managing writer for a marketing communications firm and current PhD student in rhetoric and professional communication at Iowa State University, I am interested in how agency writers learn to represent the voices of the multiple clients while still developing their own identities as agency employees and professional writers.

If permitted to conduct my research at XXX, I would not be employed by the firm but would function as an independent researcher. In exchange for access to your employees, I am willing to negotiate a mutually beneficial use of my services in writing, editing, and/or workshopping. If amenable, I would like to begin this research in September 2005 and work with the agency for 6-12 months.

### **Purpose of Study**

To date, no studies have been undertaken that explore the writing environment unique to marketing and public relations agencies. Writers in these positions often come from various backgrounds and experience interesting challenges as they develop professional identities as writers and agency employees while simultaneously dealing with their clients' multiple audiences. In-house writers do not face these challenges because they are surrounded by the corporate culture they represent in their writing. Agency writers, on the other hand, must learn from afar how each of their clients would like to be represented without the luxury of being immersed in that organization.

To explore these interesting challenges, I hope to address the following questions:

- How do agency writers negotiate issues of professional identity, expertise, and voice when writing within multiple organizational cultures (agency and clients)?
- How do agency writers learn to write as insiders and learn the genres and voices of clients in order to best represent clients to various audiences?

### **Resources Needed**

The only resource necessary to complete this study is access to interested agency writers willing to share their experiences with me.

### **Methods**

This study would use two primary methods of collecting data: shadowing and interviews (both in-person and via email). Specifically, I propose to do the following:

1. Shadow two to four writers for a few hours a week over several months as they perform writing and project-related tasks
2. Conduct weekly or biweekly one-hour formal interviews with each participant outside of work hours or during lunch to discuss their individual career choices and the challenges and opportunities of working in an agency with many clients
3. Conduct informal email interviews with participants regarding relevant activities at the time
4. If amenable, have writers keep short journals of their writing tasks and challenges during the research.

Respecting your clients' confidentiality, I will not study the actual documents that the writers are creating unless the client gives express permission to do so. Since the writers themselves rather than

the documents are the focus of the study, I will be able protect client confidentiality. If permission is given to include texts, I will protect the confidentiality of the clients by changing names and identifying details.

### **Safeguards**

As an ethical researcher and a member of the Iowa State University academic community, I will actively protect the identity of your organization, your writers, and your clients throughout my research and in all subsequent publications. In doing so I promise to

1. Disguise, as requested, the identity of the agency, its employees, and its clients in my dissertation and any article, book, or presentation that I might prepare as a result of this study.
2. Protect participants' confidentiality by only disclosing information they provide willingly. If a participant asks me to not disclose certain information, I am ethically bound by that request.
3. Allow the study participants and a representative of the agency to read anything I write as a result of this research before I submit it for dissertation approval or for publication. If the participants or representative feels that any part of the work is potentially objectionable in some way, I will work with that person to revise the work to our mutual satisfaction.

### **Reciprocity**

I realize that time is extremely valuable in an organization like yours and, therefore, would pursue ways to make my presence mutually beneficial. Possible options we might discuss include my

- Contributing roughly 4 hours of work per week in the areas of writing and/or editing
- Planning and conducting one workshop per semester on a topic you feel would best help your writers, for example in a specific software application or editing technique
- Sharing my results in an agency-targeted report at the end of my research.

### **Qualifications**

I am a former professional marketing communications writer currently finishing the third year of my PhD work in Rhetoric and Professional Communication at Iowa State. From 2000-2002 I worked as a marketing writer and project manager for The TDA Group, a marketing communications firm in Los Altos, California, specializing in marketing collateral for high tech companies. During my tenure at TDA I managed two of the firm's largest accounts and was responsible for all stages of planning, researching, writing, and publishing two quarterly marketing magazines, one of which won two prestigious publication awards in 2002. I also wrote and managed numerous smaller collateral projects. In addition to this experience, I have several years of experience in publication writing and management through various assistantships, internships, and freelance work. Attached is a current copy of my resume to further explain my professional experience as well as my research and teaching experience.

### **Conclusion**

I am very excited about the prospect of this research because I believe that current and future professional communicators should be aware of this interesting and viable type of writing career. I welcome the opportunity to meet with you to discuss further my research and will contact you the week of July 11th to address any questions you might have and discuss the possibility of a meeting.

Thank you very much for your time.

**APPENDIX B: SAMPLE INTERVIEW QUESTION PROTOCOLS**  
**PRELIMINARY PARTICIPANT INTERVIEW QUESTION PROTOCOL**

- Please tell me about your education. Did you take any specific courses or writing courses particularly that you found valuable?
- Was writing always an interest for you?
- How did you come to writing as a career?
- Please tell me about your career paths and jobs you had before coming to PSA.
  - Flesh out duties and experience in each position held.
- (If participant had worked in other agencies) What mix of services did the other agencies you worked in provide? Can you compare working at that agency with working at PSA?
- How did you come to PSA and how has your position evolved since you joined?
- When you joined the agency, what were your initial duties?
- Are those the same duties you now have as well? Please explain.
- What clients do you work with regularly now, and what services do you provide for each of them?
- What's an average week like for you at the agency? How do you spend your time?
- Can you explain the team structure to me?
- Who generally decides who works on what projects?
- What is a usual client load for a writer like yourself?
- What aspects of writing in an agency setting do you find to be most challenging?
- What aspects of writing in an agency setting do you find to be most interesting or fulfilling?
- What qualities must a person have in order to succeed as an agency writer? Why?

### **ROLE, IDENTITY, AND COMMUNITY QUESTION PROTOCOL**

- Follow up on all client projects and relationships.
- What publications do you read regularly and why?
- What professional organizations do you belong to and why/why not? Important to career? Active in the organization?
- Do you think there is a difference between a writer and an author? If so what? What do the words mean to you? Which category do you put yourself into and why?
- Describe how you define yourself as a writer (ex. descriptive title or career description). What does it mean to you to call yourself a writer?
- How does collaboration fit into your perception of what it means to be a writer?
- What particular expertise do you bring to the table as a writer that affects your role at the agency or as a professional writer in general? Do you think you draw on certain expertise more than others in this line of work?
- How would you describe your duty as a writer in this line of work?
- Do you approach your role as writer differently for different clients? Why/not? How so?
- Do you have to like a client or believe in their products/message to do your job well?
- I see three communities of practice that you belong to: agency, ad/mktg/pr industry, professional writing. Would you agree or disagree and why? What other communities of practice do you belong to or do you think affect your position as a professional? Do you think you identify yourself more with one community as opposed to the others? Why/not?
- What, in your opinion, is good work? Is good work for you perhaps different than good work in the clients' opinions?
- What kind of introduction to the agency were you given when you started here? What sources did you use to learn how to be a productive part of the agency?

### AUDIENCE QUESTION PROTOCOL

- Follow up on all client projects and relationships.
- How much do you think about your audience when you sit down to write a piece? How do you bring the audience to your mind? In what terms do you think of the audience?
- How important in considering your audience in your writing process?
- How many different levels of people in the agency and client does your writing have to make it through before it gets to the intended external public? Do you consider the agency audiences when writing? How do they affect your process? Do you consider the internal client audiences when writing? How do they affect you process?
- Where does most audience feedback on your work come from when you deliver a product: agency, client rep, client audience?
- Do you consider the audience more or less for certain clients or roughly the same for every client? What if anything makes the difference do you think?
- Do you consider audience more or less for certain types of documents that others? For example a creative ad vs. an informational ad? A press release vs. a company newsletter? A web site vs. a magazine article? A give away direct mailer vs. a branded direct mailer?
- Do you feel like you receive enough feedback when the products leave the agency to do their tasks in the world? What additional feedback from different courses do you think would help you do your work better?
- Many of you have talked about how important it is to find the key messages, the newsworthy information, for projects and to get that across to an audience. How do you decide what is most newsworthy? Whose standards or newsworthy do you use? What do you do when the story or differentiation isn't particularly newsworthy?
- What gives a message credibility to readers who are pretty jaded from being bombarded with marketing messages all the time? What gives you the credibility to write these messages or tell these stories? Does the agency work help build/create credibility for clients?



### EXIT INTERVIEW PROTOCOL

- Follow up on all client projects and relationships.
- Organization – do you feel like you are a fully participating member of the agency work? Of the agency culture? What does being a full participant mean to you? Part of the idea of organizational socialization is feeling deep loyalty to your organization if you buy in to its goals/culture: how loyal do you feel to the agency itself and why? Do you feel a different loyalty to your clients? Which do you feel more strongly? How does that loyalty affect your work? Does that loyalty contribute to how you perceive your professional and personal identity? What does the organization do to build/encourage a sense of loyalty or community? What do you think the organization could do to help you feel more loyalty or more like a member of the organization? What could you do?
- Identity—how important is being a writer to your professional identity? To your personal identity? Is advertising/marketing more/less important to your professional/personal identity? How does the work you do at the agency support/hinder your sense of professional/personal identity? What do you feel your role in the organization is as both a worker and a community member? Are you comfortable with the identity working in an agency allows you to create? How might that be different from working in-house somewhere?
- Clients – does your professional identity change or shift with the different clients you work with (how so)? What aspects of your writing do clients exert the most control over? What aspects of working with clients as a writer are most satisfying and most annoying for you? What does working on multiple accounts allow you to do professionally or hinder you from doing professionally (as opposed to say working in house on one brand)? Which do you think is more important in terms of your efforts—what the client wants or what the agency wants? Do you think one must identify more with the client than the agency or vice versa to be a successful writer in your field?
- Internal marketing efforts – where do the internal marketing efforts stand now in your knowledge? Since it's been a round for a while now, how do you feel about the brave new ideas strategy? How do you see yourself contributing to that in your writing? Do you feel like the idea has been clarified more than it was at the beginning? Has it affected the culture of the organization any further? Do you feel comfortable being positioned as a writer within that brand? What are the future plans for that marketing effort? How do you see yourself involved or participating in those efforts?
- Final thoughts – what does it mean to you to be in this industry, especially as a writer? What skills do you bring to this industry that will help you be successful? What skills do you bring to the agency that will help you be successful here? What other kind of organizational situation do you think you could be comfortable/successful in? Have you learned anything about your industry, job, writing, self through the process of this project that you'd like to share?

## APPENDIX C: DATA DUAL CODING SCHEME

To code my participant data, I used a two-column code. The first column coded for the different PSA clients and the projects the agency writers worked on for these clients during my observation period. I coded for 21 clients, three of which were pro bono clients. I also coded for four initial initiatives in which the writers were involved. In order to keep this client list proprietary, I will not include this part of the coding scheme here.

Second column codes were based on recurring themes noted throughout the data collection process. The data was formally coding using the following notations:

1. Brand/Messaging
  - a. Importance of branding/messaging to work/community
  - b. Identifying key brand elements
  - c. Identifying key brand messages
  - d. Using genres to meet the goals of the brand
  - e. Using genres to reinforce the brand messages
  - f. Comments on brand development for clients
    - i. Working with clients to develop
    - ii. Developing for the clients
2. Genre
  - a. Defines a particular genre they use internally
  - b. Defines a particular genre they use for/with clients
  - c. References to message guiding genre choice
  - d. References to limitations of the genres they write
  - e. References to the opportunities to be creative with the genres
  - f. References to helping clients understand what genre to use
3. Situation
  - a. References to dealing with client defined situations
  - b. References to identifying situational opportunities for clients
  - c. References to creating situations for clients
  - d. References to working together with client to identify/create situations
  - e. References to responding to unexpected client situations
4. Community – General
  - a. References to the communities they belong to
  - b. References to how they define community/culture
  - c. References to their place in the agency and community
  - d. Comments about understanding agency process/ideology
  - e. References to in-house vs. agency communities
5. Community – Collaborative with clients
  - a. References to how clients fit in agency community
  - b. References to how they see themselves fitting in to the clients' communities
  - c. References to importance of understanding client purposes/goals/genres
  - d. Comments about client communities
  - e. Comments about forming relationships with clients

6. Client purpose vs, agency purpose vs. individual purpose
  - a. References to agency purposes/goals
  - b. References to client purposes/goals
  - c. References to client/agency goals clashing
  - d. References to client/agency goals merging, being created/shared
7. Identity
  - a. References to how they see themselves as writers
  - b. References to how they see themselves as agency community members
  - c. References to how they fit in the industry, industry competitiveness
  - d. References to the challenges of working in agency
  - e. References to professional identity in relations to clients
    - i. How they identify with clients' goals, missions
    - ii. How they see themselves as part of those goals/missions
    - iii. In dealing with multiple client stories/audiences
    - iv. In dealing with sliding professional identity to match clients
    - v. How they see themselves functioning for the client, the client's community
8. Audience
  - a. Writing to achieve personal goals for one's self on the job (self as audience)
  - b. Writing to please agency gatekeepers (understanding agency hierarchy)
  - c. Writing to please client gatekeepers
  - d. Writing to please ultimate client audiences
  - e. Writing for clients as the audience (strategic plans, new business proposals)
  - f. Strategies for thinking about audience in writing process
  - g. Comments on how they come to identify with an audience in terms of messaging
  - h. Strategies for shifting mindsets from client audience to different client audience
  - i. Feedback from agency or client or ultimate audience

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